FLEISHMANHILLARD
The power of true

City of Raleigh

Findings from Research with Key Stakeholders

Oct. 9, 2014

Assignment, Research Objectives and Methodology

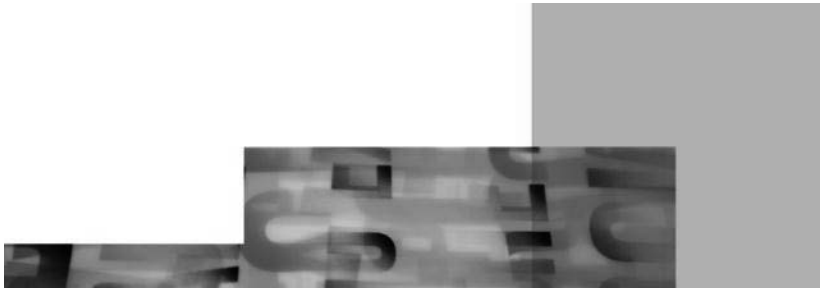
Assignment – The City of Raleigh conducted a city-wide communications audit focused on building a foundation to elevate the City's presence locally, nationally and beyond. ***The City's success in attracting business and talent to the region is ultimately based on its communications framework, which will help to tell its story to key audiences.***

Research Objectives – Research and discovery work in this report will help to set the foundation for the implementation of the strategic communications plan. This research aims to:

- Assess traditional media and digital landscape for Raleigh compared to two similar municipalities to understand positioning and conversation
- Understand perceptions of Raleigh among key stakeholders related to:
  - Strengths and weaknesses
  - Raleigh's cultural "vibe"
  - Community culture
  - Entertainment and business development
- Evaluate and refine brand positioning and communications messaging

Methodology

1. Primary Research
2. Secondary research
3. Assessment of existing tourism data
4. Landscape analysis – Boston and Austin



Primary Research Snapshot

*FleishmanHillard researchers spoke with/received feedback from a **total of 467 key stakeholders** through the research process.*

7	13	438	6	3
City Council Members	City Department Directors	City Employees	Raleigh Business Leaders	Raleigh Citizens*
In-person, in-depth interviews One hour per interview Included interview with City Manager	**Telephone in-depth interviews** One hour per interview Interviews with department leaders	**Two, in-person focus group discussions, two hours per group** One group with a mix of City employees (5) One group with City communications employees (7) **Web-based survey among mix of City employees (426)**	**Two-hour, in-person focus group discussion** Included a cross section of members of the Raleigh business community, including The Downtown Raleigh Alliance, The Raleigh Chamber, Citrix, Red Hat, Wells Fargo and Jacobs Engineering.	**Two-hour, in-person focus group discussion** Members of Citizen Advisory Council **Although citizen verbatim comments are included throughout the report, citizens are not reflected in the quantitative charts given the small number of citizen participants. A number of external factors affected the attendance for this focus group, including inclement weather, the evening schedule and the fact that the large majority of CAC representatives are volunteers, as well as senior citizens, some of whom live in underserved areas.*

Key Primary Research Insights

#1: Desire for Investment in Raleigh's Future

Participants across key audiences cite the importance of staying ahead of and being smart about growth in order to maintain the success that Raleigh has experienced to date. Specifically, they stress the importance of making investments, not only to maintain current growth, but also to prepare the City for future growth. Another important piece of this includes educating Raleigh's citizens about *why* these investments are so important to the future of the City.

#2: Two-Way Dialogue Increasingly Important

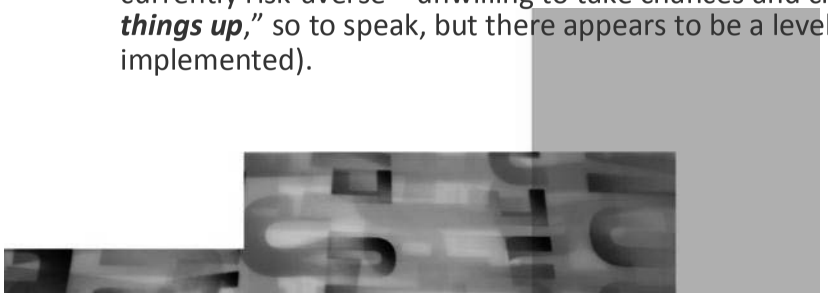
Currently, Raleigh's communication with its citizens is perceived as being very much "one way," with information simply being pushed out to the public. **However, *feedback consistently illustrates a desire for increased engagement between the City and citizens.*** Social media is often cited as a platform to facilitate more of a two-way dialogue, but in order to be effective, the City needs to be fully-committed to using it (and must use it in a way that appeals to the broader public: it must have some personality to bring the City life).

#3: Put Strategy Behind Communications Approach

According to many participants, Raleigh's current communications approach is much more reactive than proactive. Traditional methods of communication – namely, press releases – continue to be the main form of communication used, but there appears to be a desire for a more proactive, innovative approach to both internal and external communications. ***Raleigh needs to be thinking ahead and develop a thoughtful strategy behind its communications plans, both internally and externally, with an ultimate goal of tying all communications back to that overall plan.***

#4 Take risks!

Feedback consistently shows that key stakeholders feel that Raleigh's communications function (both internal and external) is currently risk-averse – unwilling to take chances and closed off to new ideas. ***There is a desire among key stakeholders to "shake things up***," so to speak, but there appears to be a level of hesitancy to speak up with new ideas (and actually get them implemented).



Key Primary Research Insights

#5: Exemplify Innovation

Raleigh is often associated with innovation, and stakeholders do agree that the City is very supportive of the creative class, start-up businesses, hosts innovative companies, etc. However, feedback also shows that *some participants believe that Raleigh positions itself as being more innovative than it really is*. This applies to innovation happening within the City itself, as well as innovation across the City's communication function. *Innovation is not only important in how the City of Raleigh is telling its story, but also how it is operating internally*; things like being open to new channels of communication, new ideas/ways of doing things, empowering employees to speak up, etc.

#6: Clarify the City's Role in Marketing

Though many internal stakeholders (and business leaders) agree that there needs to be an elevated effort to increase marketing of the City, this is not a view shared by everyone. Some question whether or not it *is* actually the City's job to be the leading ambassador for Raleigh, while others say that even if it's not, ***the City should still be working collaboratively with other organizations*** in telling the City's story. This will ensure that it is being clearly and consistently articulated from various entities, all of which have the same ultimate goal: sharing with others what a great place Raleigh is.

#7: Create a Hub for Aggregated Communications

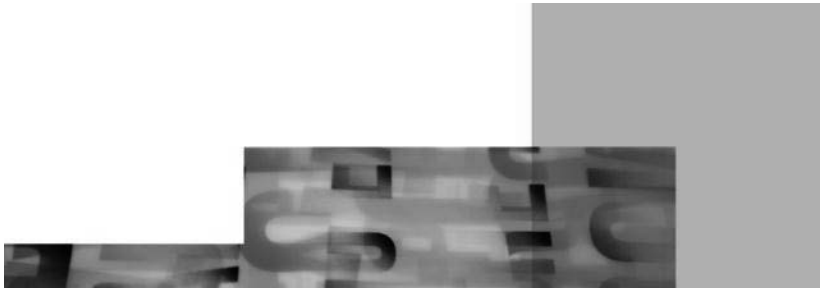
A consistent theme heard from employees is that despite the fact that many prefer electronic communications, many feel like they are getting too many emails that are not relevant to their work. ***A central "hub" that houses all communications in one place is a concept that appears to resonate with employees – 76% of those who took the survey would find it extremely/very helpful***.

#8: Strike a Balance in Delivery of Employee Communications

In the survey, nearly half of employees indicate they don't feel they receive enough information about the City. Additionally, employees generally agree that they are receiving far too many emails, many of which don't apply to their jobs or interest them, yet electronic communications is their preferred channel through which to receive City information. ***This suggests that establishing a more targeted approach for email communications to employees will be critical in getting relevant information communicated***.

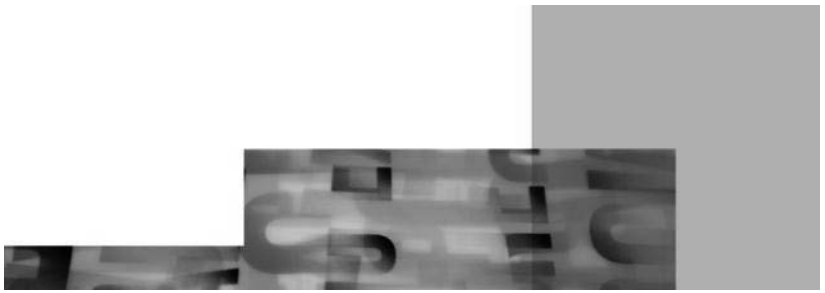
#9: Recognition of Improvement, but Desire for More

Although there is clear room for improvement, the good news is that ***stakeholders across audiences think that the City is making recent improvements and progress***. The City Council, specifically, seems optimistic when it comes to improved strategy and communications driven by the City Manager, and employees are receptive to outreach from the City Manager to date. Stakeholders are excited about increased improvements to the City.



What Makes Raleigh Unique?

*Not one, single thing, but a unique blend of various attributes – including **a diverse community, education, growth and appealing geographic factors.***



TAKEAWAYS

- Not one, single thing – instead, a unique blend
- Diverse community
- Physical/geographic logistics
- Growth
- Research Triangle Park and universities
- Educated population

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What are Raleigh's…

STRENGTHS?

- Many things; not one, *single* thing
- Growth
- Diversity
- State Capital
- Young and vibrant
- Amenities of large city, small-town feel
- Welcoming
- Offers ability to get involved

WEAKNESSES?

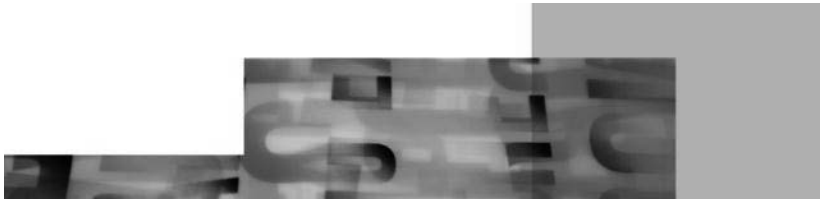
- Lack of or conflicting long-term vision
- Unwillingness to invest to achieve vision
- Education/school system
- Public transit
- Managing fast growth (more of a challenge vs. a weakness)
- Water storage capacity

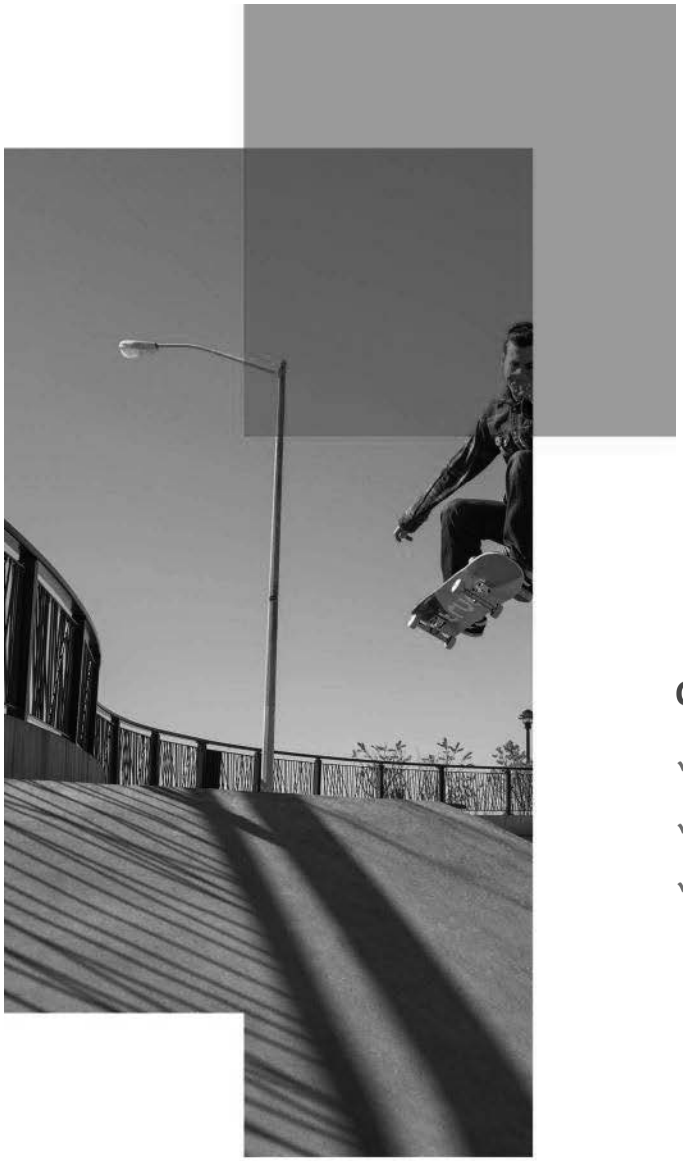
FUTURE CHALLENGES?

- Infrastructure – particularly transit, but also water system, sewage system, street maintenance, etc.
- Development of the broader region as a whole (i.e., the Triangle)
- Human Services – caring for homeless, less fortunate, seniors, etc.
- Education

- ***Strong City leadership, managing growth smartly and having a strategy*** are volunteered as ways to overcome these future challenges.

- In helping to address challenges, communication will ***open up a dialogue among citizens, sharpen Raleigh's image, educate the public and help to unify various constituents***.





Telling Raleigh's Story

*Reflects feedback from the **in-depth interviews, employee focus groups and employee survey**.*

Covered in this section:

- ✓ Top-of-mind attributes that best describe Raleigh
- ✓ Gap analysis of Raleigh's current attributes vs. their future importance
- ✓ Traditional media audit

What is the Essence of Raleigh?

A number of words and phrases come through consistently when participants are asked to describe Raleigh, including ***people, healthy, innovative, greenways, quality, diversity, design and great.***

The word cloud above gives prominence to words mentioned most frequently in open-ended responses to the question asking participants to list words of phrases they'd use to describe Raleigh.

Attribute Gaps: **Raleigh Today Versus the Future**

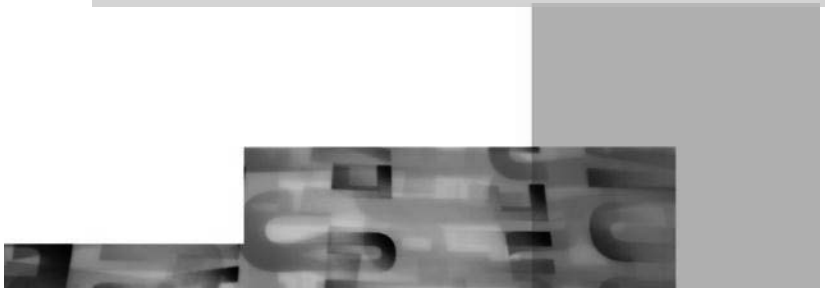
Alignment *(in how Raleigh is positioned today vs. the importance of being positioned this way in the future)*

- ✓ Recreational opportunities for wider community
- ✓ Family-oriented
- ✓ Fun activities for adults and visitors
- ✓ High quality of life

Gaps *(in how Raleigh is positioned today vs. the importance of being positioned this way in the future)*

- ✓ First-rate public transportation
- ✓ Plenty of employment opportunities
- ✓ Committed to small/local businesses
- ✓ Quality education
- ✓ Innovation
- ✓ Affordability

See Appendix for Detailed Audience Comparisons (pages 56-59)



Media Audit Observations

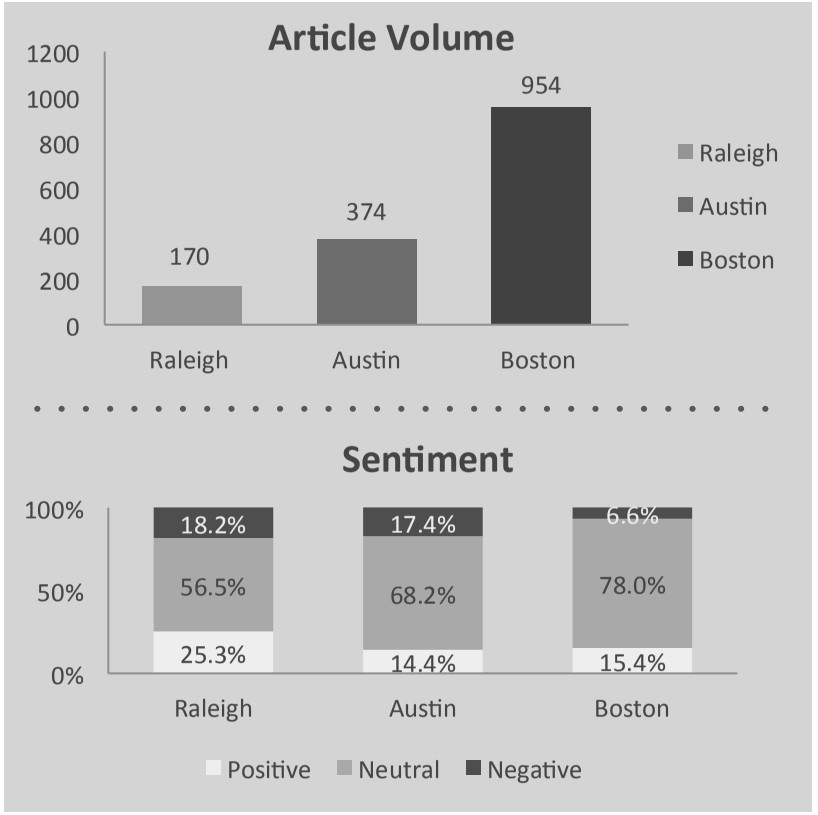
METHODOLOGY

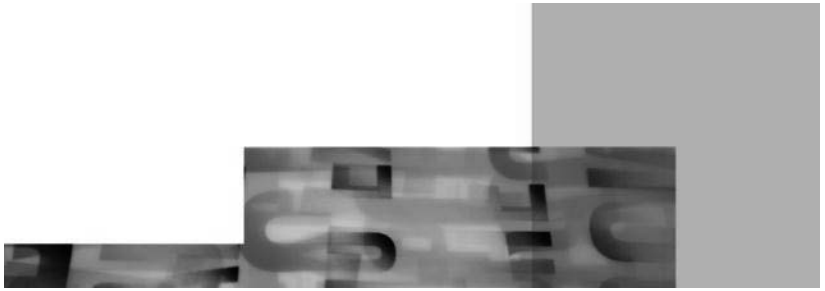
Coverage was obtained by locating RSS feeds for Austin's, Boston's, and Raleigh's major newspaper(s) and business journal, as well as relevant local TV stations that used RSS feeds. A search then generated a listing of all coverage that contained the phrase "City of Raleigh" or "City of Boston" or "City of Austin" that was published between February 17, 2014 and May 21, 2014. Additionally, periodic manual searches were done using Google for relevant city news (manual search dates run from May 22-June 8).

All coverage was compiled into separate Excel grids, with the team manually classifying each article to capture specific coverage themes/topics and sentiment of article (positive, neutral, negative).

From a volume perspective, the **City of Raleigh received significantly less coverage than Boston and Austin**. Boston was the clear leader in volume, garnering almost six times as much coverage as Raleigh.

What's noteworthy is that **despite Raleigh's lower volume, it was the city that received the most favorable coverage among all three.** One-fourth of Raleigh's coverage was favorable in tonality, compared to approximately 15% of Austin's and Boston's.





Media Audit Observations

- **Development and planning drove most of Raleigh's traditional news media coverage** (rezoning, downtown development plans, Dorthea Dix Park, etc.); development coverage was significantly higher than Austin's and Boston's.

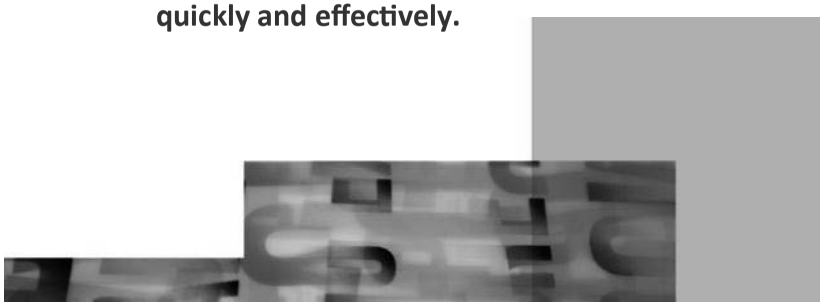
- **Coverage was mostly neutral** – *likely the result of news pushed out via press releases*, which is the City's primary way to distribute information.

- Many of the features that stakeholders feel are most important to Raleigh's future – safety, employment opportunities, quality education, strong economic base – are not communicated nearly as frequently in the news media (indicating a **prime opportunity to take on a leadership role** and proactively tell the City's other important stories).

- **City government news is light in Raleigh compared to other cities**, which tend to communicate council decisions impacting the cities. A potential opportunity to enhance this external communication is to provide a dedicated communications support staff member for the Mayor and council.

- The higher volume of coverage in Boston and Austin can be attributed to some key events in those markets, including the one-year anniversary of the **Boston marathon and SXSW in Austin**.

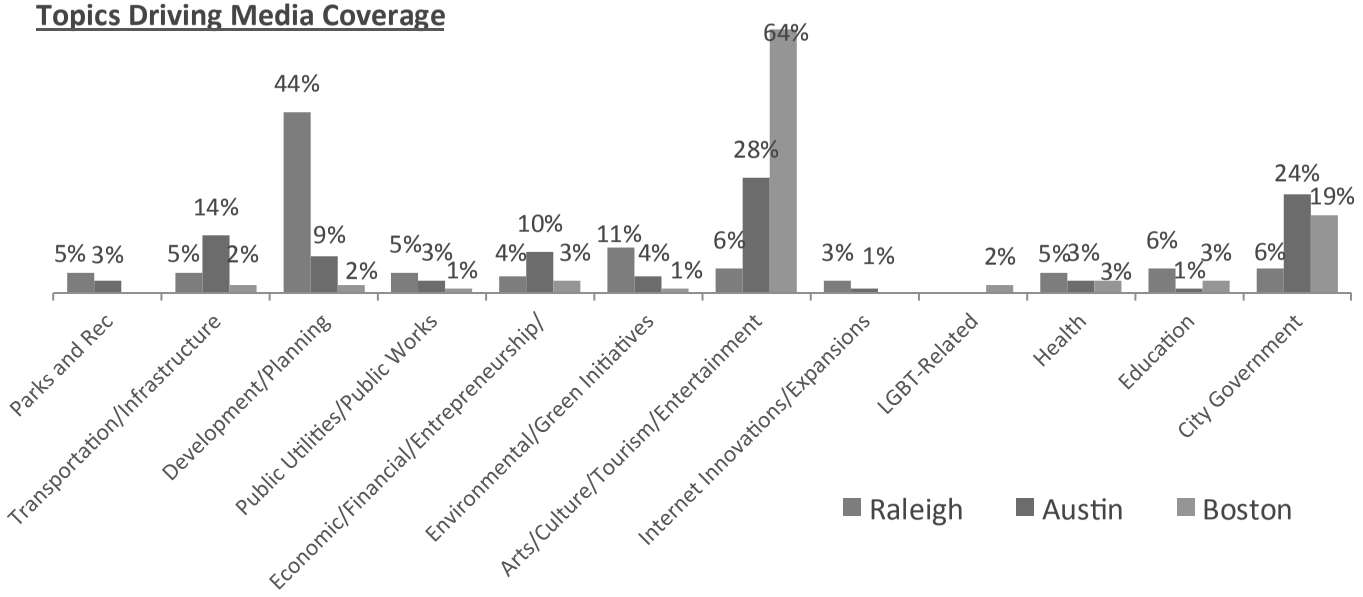
- News media positioned transportation in Austin negatively. Not only was there a high *volume* of coverage regarding transportation in Austin, but also there was an intensely negative *sentiment* to it. **The City of Raleigh knows the issue of transportation is a key priority so the insights on how the issues are viewed in Austin underscores the importance to progress quickly and effectively.**



Media Audit Observations

- **Raleigh's most negative coverage area focused on Public Utilities (water)** programs. Multiple articles touched on resident complaints about sewage spills and the taste of water. An investigative report looked into potential dangers that road salt posed for drinking water, and other coverage highlighted damage and corrosion caused by some citizens' dumping grease down their sinks. While this was the most transparently negative coverage area/topic for the City of Raleigh, it was also the *only* truly negative coverage area (Boston and Austin both had multiple general coverage topics that skewed negative overall, versus Raleigh's one).
- **All three cities showed strong and positive news about economic/financial news and internet expansions/innovations**. Raleigh and Austin also received significant positive coverage for being new Internet innovation hubs with programs like AT&T's Gigabit internet and Google Fiber's new service, while Boston also featured the launch of a new citywide Internet program.

Topics Driving Media Coverage



Raleigh leads all three cities on topics such as parks and rec, environmental/green initiatives, internet/ innovations/ expansions, health and education. Raleigh is off to a good start in terms of communicating some of the key attributes that it hopes to share, but overall, coverage on these topics is fairly low, which indicates plenty of opportunity to increase those conversations.

Raleigh's External Communications

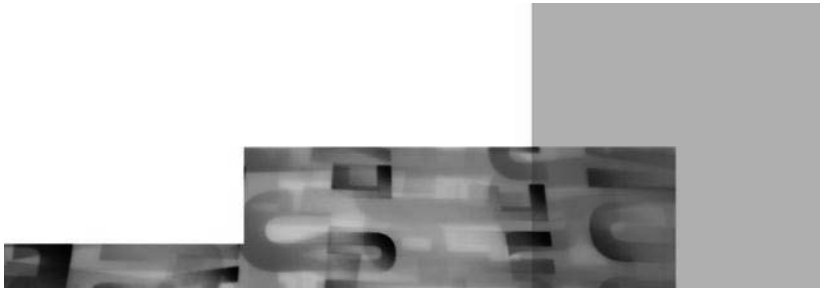
*Reflects feedback from the **in-depth interviews and focus groups.***

Covered in this section:

- ✓ Strengths + weaknesses of Raleigh's external communications function
- ✓ What message(s) is Raleigh communicating?
- ✓ Gap analysis of importance of external tools vs. City's effectiveness in using them
- ✓ Other types of external tools to consider

Strengths and Weaknesses of Raleigh's External Communications Function

- **Strengths of Raleigh's External Communications Function?** The City has strong relationships with local media and effectively utilizes those connections.
- **Weaknesses of Raleigh's External Communications Function?** Numerous weaknesses volunteered, including fragmented communications, lack of consistency/coordination and a reactive approach.
- **What Messages is Raleigh Communicating?** Raleigh's accolades are consistently communicated, though others find there to be a lack of consistency in other messaging.
- **Is it the Right Audience, Right Message and Right Channel?** Biggest issue is getting people to receive the message and act on it.



Communication Tool Gaps: **Importance vs. Effectiveness**

Alignment *(important and currently effective)*

- ✓ RTN
- ✓ Print advertisements

Gaps *(important with room for improvement)*

- ✓ Twitter handle
- ✓ Facebook page
- ✓ YouTube channel

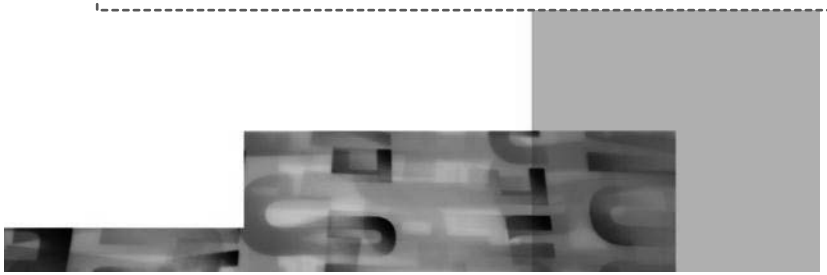
See Appendix for Gap Comparison of External Tools (pages 60-63)

OTHER COMMUNICATIONS TOOLS THE CITY OF RALEIGH SHOULD CONSIDER

- Community outreach + meetings (especially for older citizens)
- Consider the digital divide
- Latino channels
- Professional associations and networks
- Direct mail
- PSAs
- Increased use of social media (and an established policy around it)

VARYING VIEWS: RALEIGH TELEVISION NETWORK

- Need for fresh content that is current and informative to promote recent and upcoming events
- Improved accessibility of programming would be beneficial (i.e., concise online videos, promotion through social media)
- Production doesn't promote innovation
- Department directors and City Council members tend to rate RTN higher than employees and business leaders
- Opportunity to improve the quality of programming



Top External Communications Recommendations

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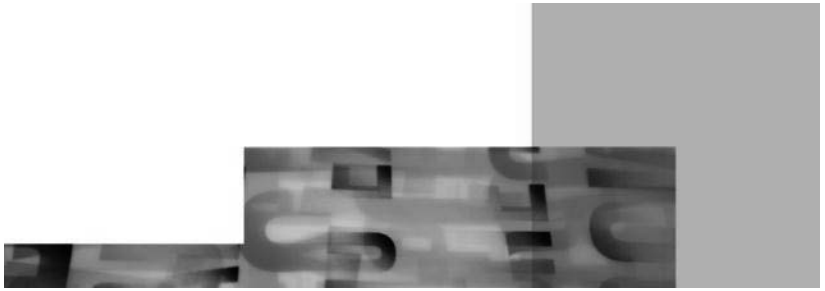
1 Create Focused Messages to Establish Authenticity

Based on the research findings, the City of Raleigh's key messages should focus on several core themes:

DIVERSE, SUPPORTIVE COMMUNITY	HEALTHY POPULATION THAT WORKS HARD AND PLAYS HARD	GROWING, INNOVATIVE COMMUNITY	CLEAN, SAFE AND PICTURESQUE	TALENT

As the City of Raleigh works to refine these messages, there are various opportunities to package and tell many of these stories in a concise campaign that highlights these key messages. **Consider a communications campaign based on the "Faces of Raleigh," which would allow the City to also communicate that it has many characteristics that appeal to a diverse population.** As stated in the point-of-view on page 21, the "City of Oaks" can still have a place in such a campaign (i.e., potentially by showing how each face of Raleigh has a place on the branches of an oak tree, for instance).



2 Showcase Raleigh's Personality Via Communications

Although the City of Raleigh is a capital city, feedback illustrates that business leaders and employees alike **think of Raleigh as much more than the state's capital.**

The current buzz in Raleigh – resulting from small businesses like shops, breweries and coffee shops, new corporations like Citrix and even the greenway and events like the Bluegrass Festival – is that Raleigh is *fun*. Its people are *friendly* and *welcoming*. Business leaders even recognize that Raleigh is very welcoming to both outsiders and businesses and that it is *easy to plant roots.*

Consistently using the fun, friendly, welcoming attitude that Raleigh naturally embodies in the City's communications will help bring Raleigh's personality to life!

"Even from a business community perspective…**put community over own individual needs**. We want you here! Many new communities don't necessarily want new business. Not only we have open arms, we'll hug you when you come. We want you here." – Business Leader

"Lots of meet ups and lunch and learns. A lot of support for that. In a lot of cities, you might find that to be competitive. Here, I **find it to be much more of a community spirit**. Red Hat very much draws on the community. We attracted a type of talent that wants to have more of a community feel." – Business Leader

"Sweet tea with a shot of vodka!" – *City Council Member*

"We **consistently message that we're proud of where we live**, we enjoy our lifestyles and our qualities. And if you're a visitor, we want you to enjoy them. And if you live here, we want you to be a part of that." – *Department Leader*

"I do think the City has made clear to the country that this is an area that does have **characteristics that are appealing to many**, welcoming to those who might be interested, either calling Raleigh home or visiting." – *Department Leader*

FOR CONSIDERATION: As the City refines its key messages and personality, there is an opportunity to also revisit some of the City's visual assets to mirror the City's personality and messages (i.e., logo, RTN, website, social platforms, signage). All of these assets should be considered.

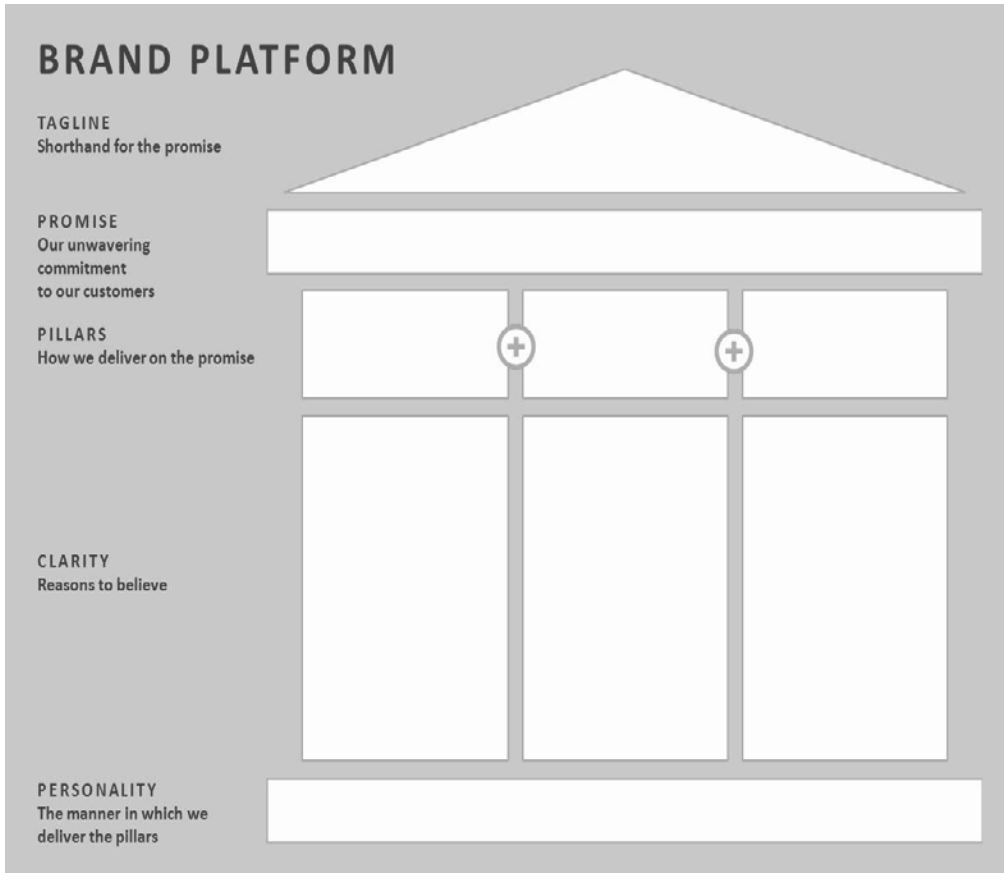
3 Consider Development of Brand Platform

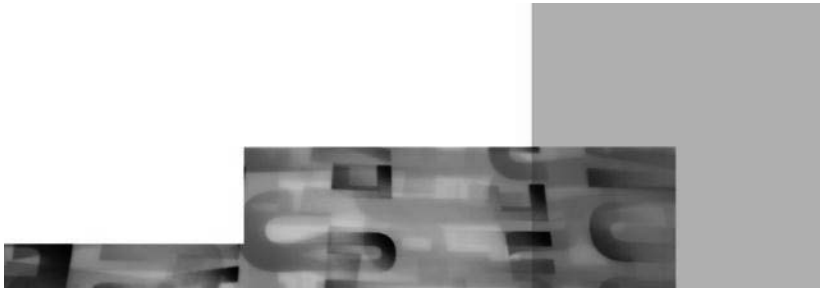
FleishmanHillard recommends taking the research and recommendations in this report to develop a City of Raleigh brand platform.

A brand platform can be viewed as a brand's North Star. The process of creating a brand platform based on research and insights provides an opportunity for an organization to reflect and align on what it will promise, which should be believed and how it will tell its story for maximum impact.

The brand platform will further develop the key messages and personality and provide other important communications elements like a tagline, promise and proof points**. The product will serve as a clear blueprint for all City communicators to follow in their external communication efforts. This tool will also help teams prioritize communications efforts by ensuring that activities fall within the City's key message themes.**

The FH team recommends a working session composed of no more than 7-10 key members of the communications and leadership team to refine messaging and arrive at a cohesive brand platform using the model shown here.





4 Leverage City of Oaks Moniker

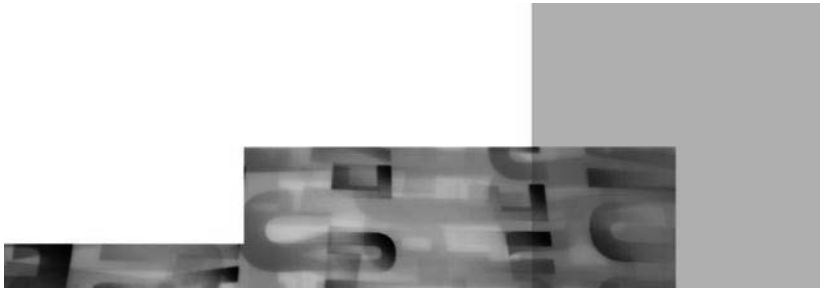
Stakeholders had varied opinions about the "City of Oaks" moniker for Raleigh and whether the City should move away from it. As the City considers a re-fresh of its "story," we felt it important to share our point-of-view. While the City of Raleigh may wish to research this matter further, FleishmanHillard believes **there remains a place for the "City of Oaks,"** and it does not detract from a position as innovative or forward-thinking.

There is a history, legacy and awareness around this name and it is used extensively through third parties. The name is not diminishing in the least and **may even be used to the City's benefit as it continues to build out its environmental/innovation story. The "City of Oaks" image also lends itself to the diverse opportunities in Raleigh, as the many branches of an oak tree may represent the diverse interests, activities and populations found in Raleigh.**

Think… Clean, Green, Strong, Beautiful, Diverse

Further, other key cities have continued to be who they are while maintaining similar timeless nicknames. These names have not detracted from the cities being what they want to be:

- City by the Bay
- Windy City
- Big Apple
- Gateway City



5 Enhance Crisis Communications Plan

Raleigh's current crisis communications plan (dated August 2013) offers a solid foundation for how the city's key representatives will communicate and respond during a crisis or controversial event. However, **there is an opportunity for this plan to be further enhanced through a number of modifications that will ensure the City is most effectively handling its crisis communications.** FH recommends making the following adjustments to the current plan to increase its strength and usability.

1. **Update crisis communications manual** to include the latest staff contacts.

2. **Re-evaluate the vulnerability assessment.** Have all scenarios been considered?

3. **Include list of key media contacts** to allow any member of the crisis communications team to be able to act on behalf of the City to share crisis response updates with key media.

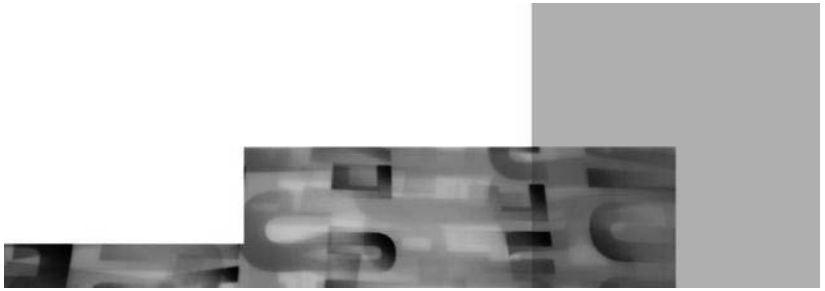
4. **Include sample statements** for scenarios written for various mediums (traditional media, website, Twitter, Facebook, etc.).

5. **Consider crisis training and spokesperson training** to ensure the team and spokespersons are prepped accordingly.

6. **Conduct a crisis drill.**

7. **Establish an on-call process.** Much like hospital communications staff are always on-call in the event of a hospital-wide or area crisis, the City of Raleigh should have a core team of individuals who are the first line in the event of a crisis. This rotating responsibility would charge a member of the team with notifying the rest of the core crisis communications team.

8. **Consider setting up an internal crisis phone number and email** informing staff in all City of Raleigh departments to immediately report a crisis or potentially controversial event. The number and email would be re-routed to the responsible member of the crisis team on a predetermined schedule.



6 Digital Recommendations

Engage All Departments – *Rally internal champions in establishing and maintaining a cohesive social media strategy*

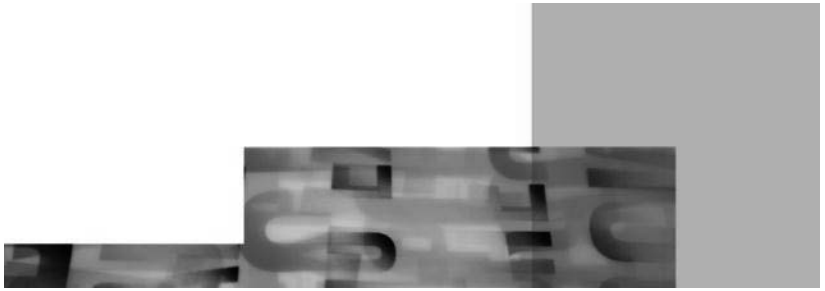
- **Establish an integrated communications strategy** – Identify key message themes to communicate the unique personality of the City of Raleigh that is consistent across all external communications.
- **Conduct collaborative planning** – Build alignment and pride in the social strategy to guide future communications and establish a more cohesive voice to external audiences.
- **Put a face on the City's social presence** – Raleigh's greatest strength lies in its people. Consider a communications campaign based on the "Faces of Raleigh," which would allow the City to also communicate that it has many characteristics that appeal to a diverse population.

Identify Internal Social Media Leaders – *Designate social strategists, team leads and social communicators to serve as Raleigh's voice*

- **Introduce a social media policy** – Empower social media use across departments and set internal standards to guide City departmental social use and ensure that all social communications abide by best practices.
- **Outline account architecture and designate social communicators** – Create a map of content contributors, communicators and core decision makers in order to best leverage the City's current social assets.

Capitalize on Two-Way Conversations – *Set Raleigh up for success in identifying and responding to social commentary about the City*

- **Consider a social listening program** – Identify, analyze and respond to online conversations about the City of Raleigh, particularly as it relates to public safety and emergency response.
- **Create key messages and brand standards** – For all social media publishers to follow, along with educational materials that will better serve social account managers and help them to understand and communicate in Raleigh's social voice.
- **Showcase Raleigh's personality through dynamic photo, video and interactive content types** – Consider social campaigns that engage citizens and thought leaders to help define the City's current social media presence and identity. Use that data and feedback to craft a vision of Raleigh's future social presence and identity.



Raleigh's Social Observations

Secondary Research

In conversations including a value statement about why someone should live in Raleigh, commenters listed its low cost of living, high quality of life, youth and vibrancy, greenways and parks system, education and the **amenities of a large town with a small-town feel.**

Raleigh also offers businesses a strong, educated talent pool through its proximity to universities and has a high quality of life for residents making it an ideal place for employees to live. On top of that, its booming entrepreneurial and tech scenes make it all the more appealing to residents and those considering moving.

These themes are also demonstrated in threads of online social conversation.

From a residential and business perspective, **negative conversation about the city is very limited.** Some of these conversations were around public transit, the police, the school systems and lack of incentives for businesses to select Raleigh.

Communications will play a key role in helping Raleigh to address challenges, as it will **serve as a way to open up dialogue both internally and externally, helping to increase both citizen and employee engagement. Additionally it will help unify various constituents** and will help to sharpen Raleigh's image as a whole.

The community is highly engaged and passionate to live in the city, which gives City digital properties a big opportunity to engage them in a way that best meets their needs.

Summary of Digital Findings

Raleigh's internal leaders and partners have a strong desire to engage via social, but lack a unified direction

TAKEAWAY #1

Raleigh's best social efforts are propelled by enthusiastic departments with **no dedicated specialists steering the organization,** which is reflected externally.

TAKEAWAY #2

Raleigh can **prioritize efforts and investments** by focusing on better approaches to passionate citizens, business leaders and influencers, meeting them where they spend their time.

TAKEAWAY #3

Raleigh has interest and an audience for engagement, but currently functions with a **megaphone, not a telephone.**

TAKEAWAY #4

Raleigh is several steps behind leaders in the social municipal space who leverage their presence across multiple channels, creating a **cohesive identity** that also addresses key audience's needs individually.

See Appendix for Detailed Digital Findings (slides 44-54)

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The Way Forward…

Where does the City of Raleigh go from here on the digital space?

INSIGHT #1

Create a **central, internal resource for social media** as a core pillar to internal teams. For each team with a social channel, designate a social communicator. Develop accessible educational programs to convert advocates to champions.

INSIGHT #2

Allocate resources to key internal hires to create a **centralized structure following a hub and spoke model**. Identify key reporting and information flow structures, and empower internal social managers for success.

INSIGHT #3

Develop **roles, responsibilities and workflows** with core hubs to determine how Raleigh will engage on prioritized channels.

INSIGHT #4

Learn from other municipalities' forays into social – both successes and failures – and create a clearly **defined, enterprise-wide social communications strategy for Raleigh** in order to execute on the city's vision.

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Most Shared Topics

Traditional media coverage driving social conversations online

The City of Raleigh generally receives media coverage that is favorable or neutral in tone, helping to drive a positive city identity when those articles are shared through social media, proliferating online conversation.

Among the most frequently shared topics are **"Top 10" lists**, specifically those that focus around **art, culture, family, and general 'quality of life' rankings**.

Negative, controversial or polarizing topics also tend to spread quickly via social media, such as education, fracking and environmental issues, and immigration, though shares are more likely to be neutral than negative in tone.

Article	Sentiment	Social Shares
10 best city art districts around the USA	Positive	10,579
NC plans to hike teacher pay, McCrory announces	Positive	7,475
NC fracking panel passes chemical disclosure rule	Neutral	4,511
Raleigh, N.C. - 10 fastest growing cities	Positive	4,485
Judge halts effort to end teacher tenure in NC	Neutral	4,047
The Raleigh Experiment	Negative	3,920
America's Best Cities for Raising a Family	Positive	3,475
Heartbreaking: Raleigh named worst city in America for dating	Negative	3,297
Feds launch criminal probe of NC agency after coal ash spill	Negative	3,262
Texas school system tries to poach NC teachers	Negative	3,230
Immigrants march to Raleigh, demand in-state tuition rates	Negative	3,200

Raleigh's Current Social Conversation

Raleigh Community
*Individuals and organizations alike express positive views toward the Raleigh community in online social conversation, regularly citing the diverse range of **opportunities** and **activities available***

Raleigh as a Place to Live
Overwhelmingly, Raleigh is looked upon favorably as a place to live, regularly topping "Best Cities" lists

Raleigh Parks & Recreation
Raleigh's expansive greenway system is what has social users most excited about the city's Parks & Rec

Raleigh Arts, Culture & Education
The online community gets excited about Raleigh museums and cultural activities, and its universities are frequently lauded

Raleigh Growth & Resources
Downtown Raleigh is once again a leading driver of conversation for social users speaking on the City's growth and resources

Raleigh Economic Development
Positive sentiment toward the economic and business climate of Raleigh proliferate, particularly surrounding technology

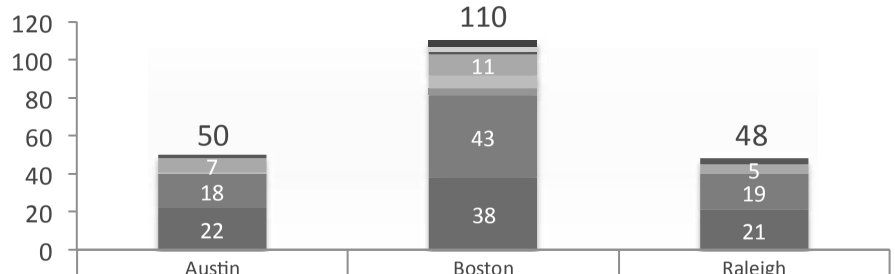
Raleigh Transportation & Transit
The online community generally agrees that Raleigh transportation and transit is in need of significant improvement

Social Landscape Snapshot

Snapshot overview of landscape comparing Austin, Boston and Raleigh

- Boston maintains a significant number of accounts in comparison to Raleigh, but Austin's number is comparable.
- Raleigh has the lowest number of branded social accounts relative to the landscape set reviewed.
- Of 'City of [Name]' mentions, Boston surpassed both Austin and Raleigh with 34,667 mentions within the past 90 days, followed by Austin.

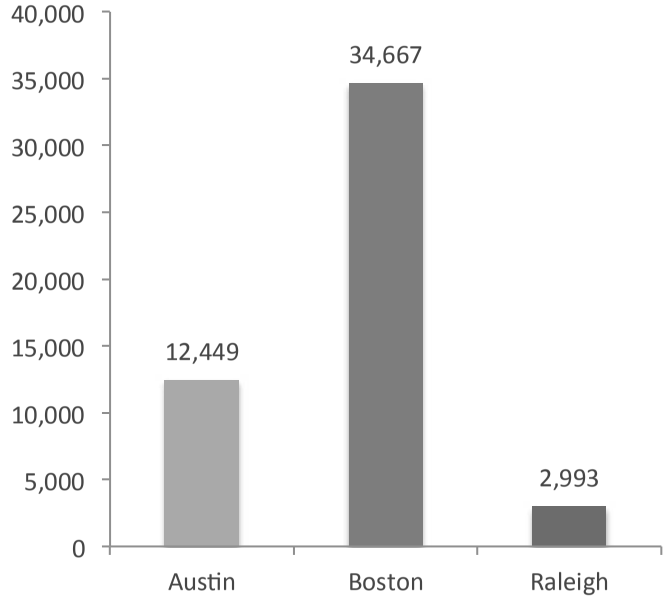
Number of Owned Social Accounts



	Austin	Boston	Raleigh
Google+	0	3	0
LinkedIn	0	3	0
Pinterest	2	1	3
YouTube	7	11	5
Tumblr	1	7	0
Instagram	0	4	0
Twitter	18	43	19
Facebook	22	38	21

Social Conversation Volume

March 1 – May 31, 2014



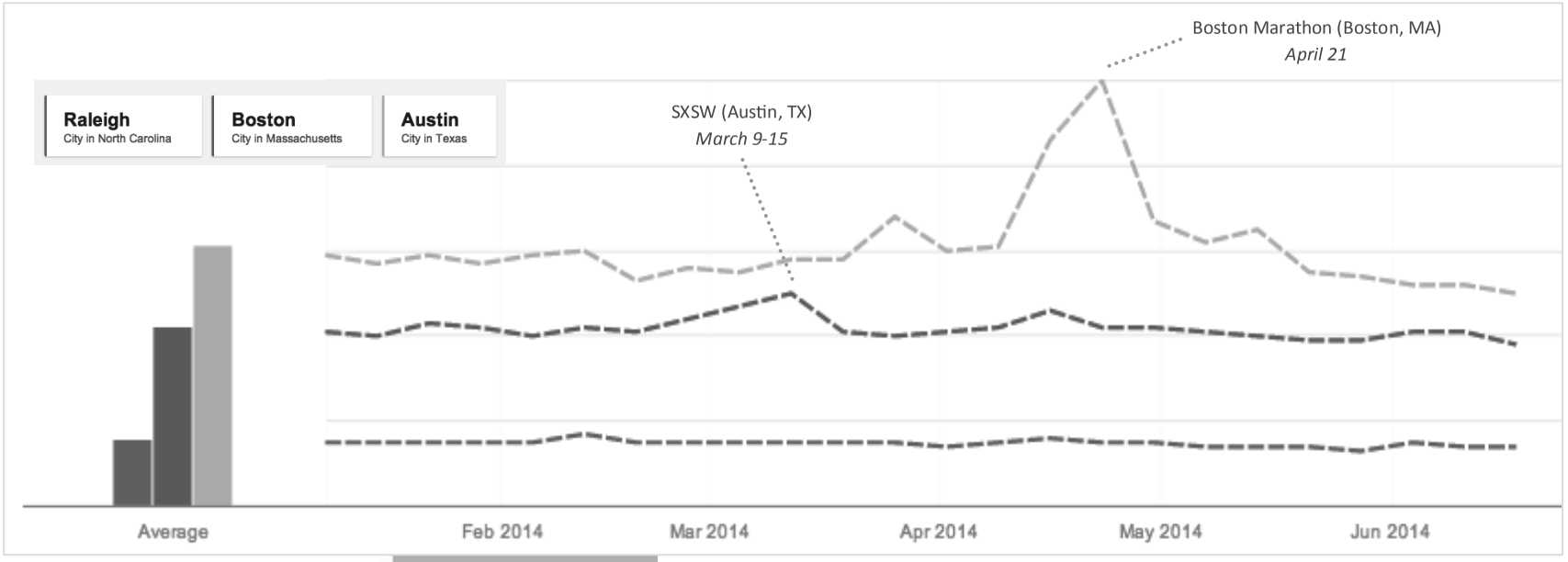
Search Visibility

Searches for the City of Raleigh remain steady with no clear spikes in activity

Search volume since January 1, 2014 has remained steady for the City of Raleigh, averaging 6 searches per day.

This trend is in alignment with the previous 12 months of search trend data, with Raleigh showing no significant spikes or declines in search activity within that timeframe.

Comparatively, the City of Boston saw a sharp spike leading up to and on April 21, 2014 related to the Boston Marathon, as the city commemorates the one year anniversary of the Boston bombings by celebrating the 36,000 athletes who converged to run the 118th Boston Marathon.



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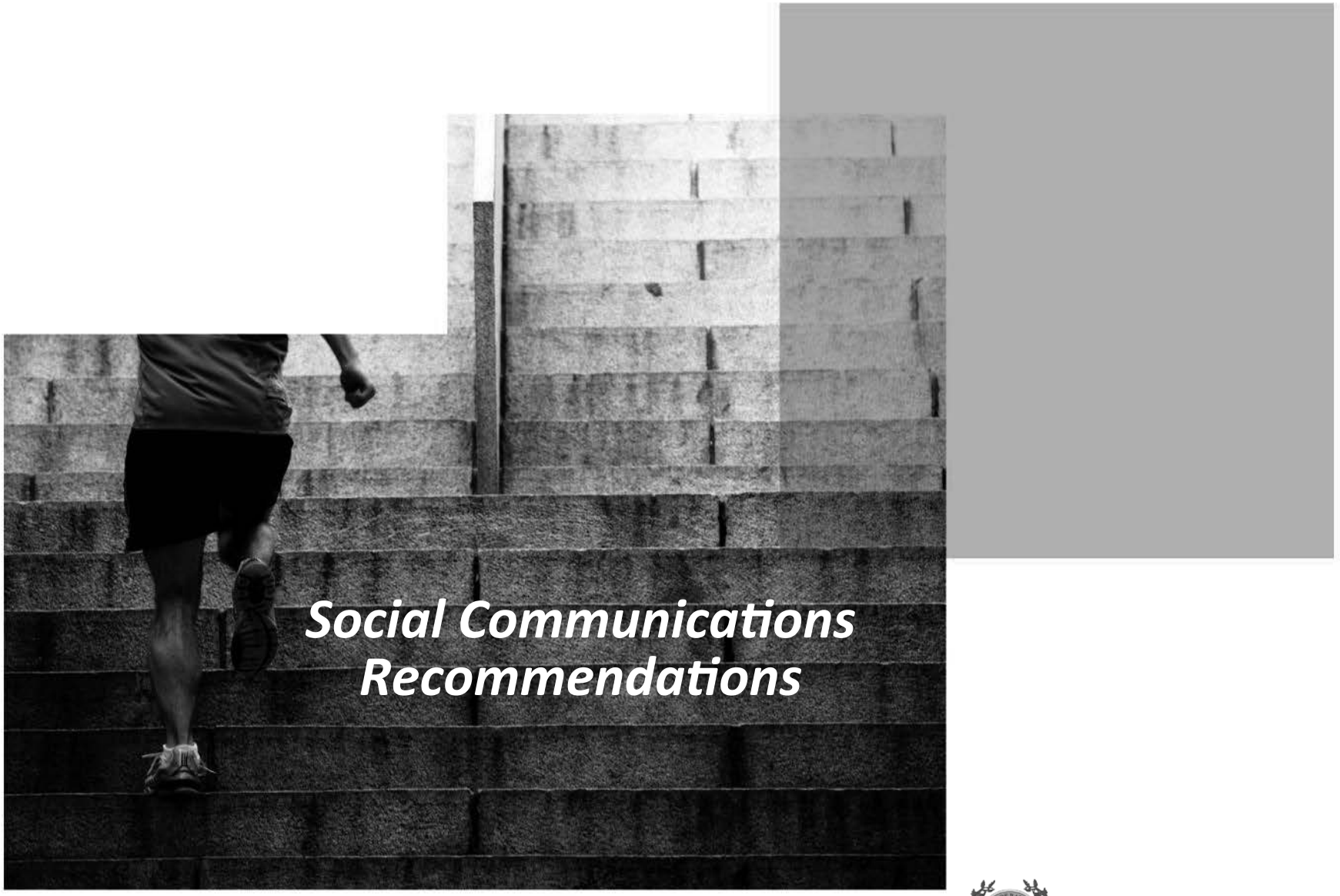

Social Communications Recommendations

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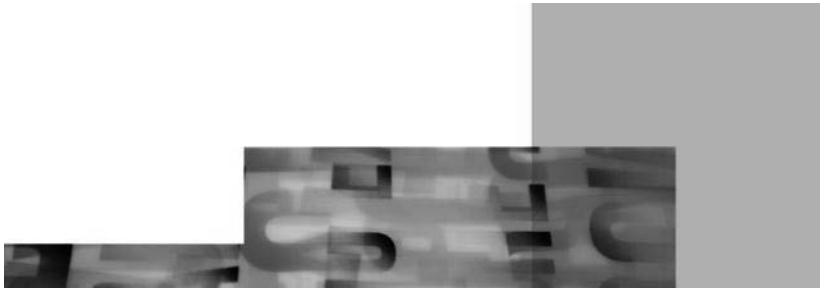
Recommendations Summary

A clear desire exists for the City of Raleigh to take the next step in its internal communications strategy in order to positively impact the way it's telling its story. The implementation of the City's new organizational strategy in July 2014 provides a prime opportunity for the City to **reassess how it manages the flow of social communications internally and how the various departments package Raleigh's story to share with all audiences via social mediums.**

While city employees have, in the past, valued the "family feel" of Raleigh, the City now requires a more structured communications operation – which should encompass social media – to help ensure all departmental and elected official needs are being met. More and more, municipalities and even larger non-profits are operating with structured communications team models, utilizing multiple prongs to ultimately support an overarching branding strategy and communications pillars.



Engage All Departments

Rally internal champions in establishing and maintaining a cohesive social media strategy

TAKEAWAY #1

Raleigh's best social efforts are propelled by enthusiastic departments with **no dedicated specialists steering the organization,** which is reflected externally.

INSIGHT #1

Create a **central, internal resource for social media** as a core pillar to internal teams. For each team with a social channel, designate a social communicator. Develop accessible educational programs to convert advocates to champions.

Recommended Next Steps

- **Establish an external communications strategy** - As the City of Raleigh considers the proposed key message themes and personality of the City of Raleigh, this is a prime opportunity for leadership to include the key communicators from the City's 19 departments.
- **Collaborative planning** – Include *all* team members in the process to help to build pride in the social strategy and encourage alignment in future communications in order to establish a more cohesive voice to external audiences.
- **Put a face on the City's social presence** – Raleigh's greatest strength lies in its people. Consider a communications campaign based on the "Faces of Raleigh," which would allow the City to also communicate that it is many characteristics that appeal to a diverse population.

Identify Internal Social Media Leaders

Designate social strategists, team leads and social communicators to serve as Raleigh's voice

TAKEAWAY #2

Raleigh can **prioritize efforts and investments** by focusing on better approaches to passionate citizens, business leaders and influencers, meeting them where they spend their time.

INSIGHT #2

Allocate resources to key internal hires to create a **centralized structure following a hub and spoke model**. Identify key reporting and information flow structures, and empower internal social managers for success.

Recommended Next Steps

- **Introduce a social media policy** - introduce technologies to empower social media use across departments and work closely with social media liaisons across the City, designing social strategy that helps the City of Raleigh make its programming more accessible and digitally engaging.
- **Identify or hire a social media strategist** – this individual will work with the core social governance group to lead Raleigh's social communications function, serve as a resource, and oversee social communications efforts on behalf of the City's 19 departments.
- **Outline account architecture and designated social communicators –** many of the City's accounts have unclear ownership. Creating a map of content contributors, communicators and core decision makers is the first step toward better leveraging the City's current social assets.

Capitalize on Two-Way Conversations

Set Raleigh up for success in identifying and responding to social commentary about the City

TAKEAWAY #3

Raleigh has interest and an audience for engagement, but currently functions with a **megaphone, not a telephone.**

INSIGHT #3

Develop **roles, responsibilities and workflows** with core hubs to determine how Raleigh will engage on prioritized channels.

Recommended Next Steps

- **Consider social listening** program to better identify, analyze and respond to online conversations about the City of Raleigh, particularly as it relates to public safety and emergency response.
- **Create key messages and brand standards** for social media publishers to follow, along with educational materials, that will better serve social account managers understand and communicate in Raleigh's social voice.
- **Showcase Raleigh's personality through dynamic photo, video and interactive content types**. Consider social campaigns that engage citizens and thought leaders to help define the City's current social media presence and identity. Use that data and feedback to craft a vision of Raleigh's future social presence, and identity.

Apply Lessons from Leading Municipalities

Social media analysis of leading municipalities revealed areas of opportunity for Raleigh

TAKEAWAY #4

Raleigh is several steps behind leaders in the social municipal space who leverage their presence across multiple channels, creating a **cohesive identity** that also addresses key audience's needs individually.

INSIGHT #4

Learn from other municipalities' forays into social – both successes and failures – and create a clearly **defined, enterprise-wide social communications strategy for Raleigh** in order to execute on the city's vision.

Recommended Next Steps

Raleigh can leverage the successes of other social municipalities to:

- **Delegate** a social media strategic lead internally
- **Re-work** organizational structure and workflow
- **Establish** an enterprise-wide, strategic approach to social
- **Top-down** communications to get department leaders on board
- **Implement** measures to foster collaboration and synergies
- **Enhance** the crisis communications plan to include social
- **Development** of overarching brand platform, communicate it online
- **Create** focused messages and quick responses to establish authenticity
- **Establish** Raleigh's voice to bring its personality to life via social media

Raleigh's Internal Communications

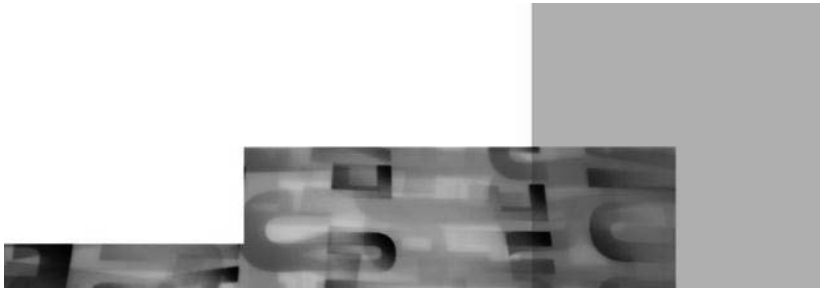
*Reflects feedback from the **in-depth interviews and focus groups.***

Covered in this section:

- ✓ Attributes of a best-in-class internal communications function
- ✓ Strengths + weaknesses of Raleigh's internal communications function
- ✓ Current process for receiving information about the City + its operations
- ✓ Use and effectiveness of current internal communications tools
- ✓ Frequency and types of information received internally
- ✓ Ratings of Raleigh's internal communication attributes

What are the Key Attributes of a Best-in-Class Communications Function?

- ✓ Dynamic
- ✓ No silos/not compartmentalized
- ✓ Collaborative
- ✓ Well-informed employees
- ✓ Variety of communication tools to reach all
- ✓ Accurate, clear, concise, simple
- ✓ Regular, consistent, timely, credible
- ✓ Accessible info for all employees
- ✓ Clearly outlined expectations and strategic goals
- ✓ Consistency of message and response across the board
- ✓ Proactive (not reactive)
- ✓ Make it interesting/compelling
- ✓ Transparent
- ✓ Creative
- ✓ Two-way dialogue



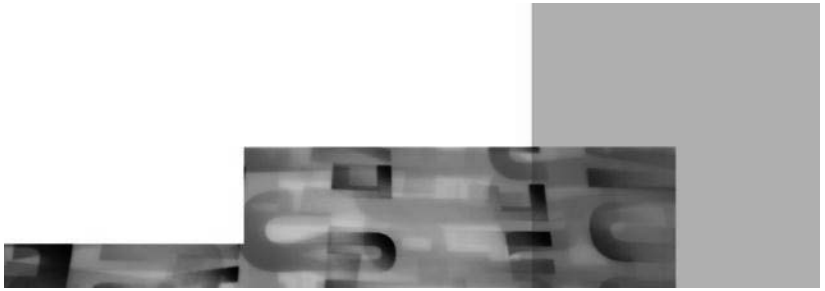
Strengths and Weaknesses of Raleigh's Internal Communications Function

STRENGTHS

- Strong relationships among departments
- Communicating basic information on Intranet
- Manager's update and meetings with department heads
- Improved website
- Disseminating information through press releases

WEAKNESSES

- Departments doing their own thing/ fragmented
- Too much information
- Not always timely, accurate or consistent
- No strategy or coordination behind internal comms + lack of crisis communication plan
- Not utilizing all channels
- Not reaching all employees
- No formal structure/process for keeping council members informed of what's happening in the community so they're prepared for any issues that may arise



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How Do You Currently Receive Information About Raleigh?

City employees get information about the City and its operations through a variety of ways, but this most frequently includes email communications and the City's websites (internal and external).

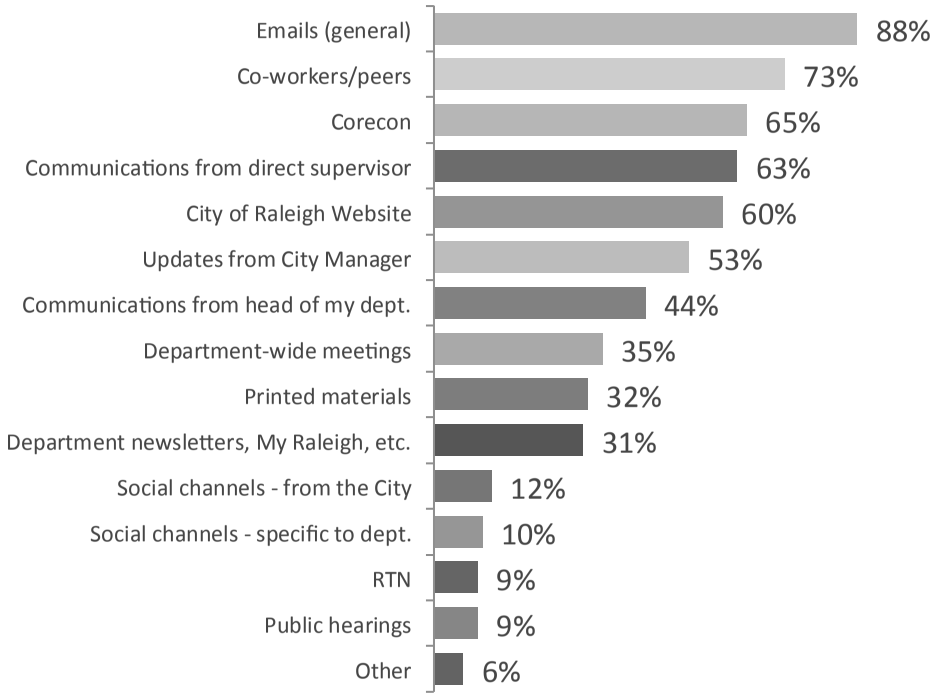
TAKEAWAYS

- Meetings with and updates from City Manager
- Word of mouth
- Internal website and City website
- Email communications
- Nearly nine in 10 employees receive news and information about the City via email, while three-fourths rely on their co-workers for information.

- ***While electronic email appears to be the preference for most employees, they do volunteer things like direct communication from their supervisor, along with the publication of newsletters.***
- ***Additionally, 95% agree a city-wide communications tool for employees/staff offering recent, city-related news would be useful.***

See Appendix for Additional Insight into Internal Communication Tools (pages 64-67)

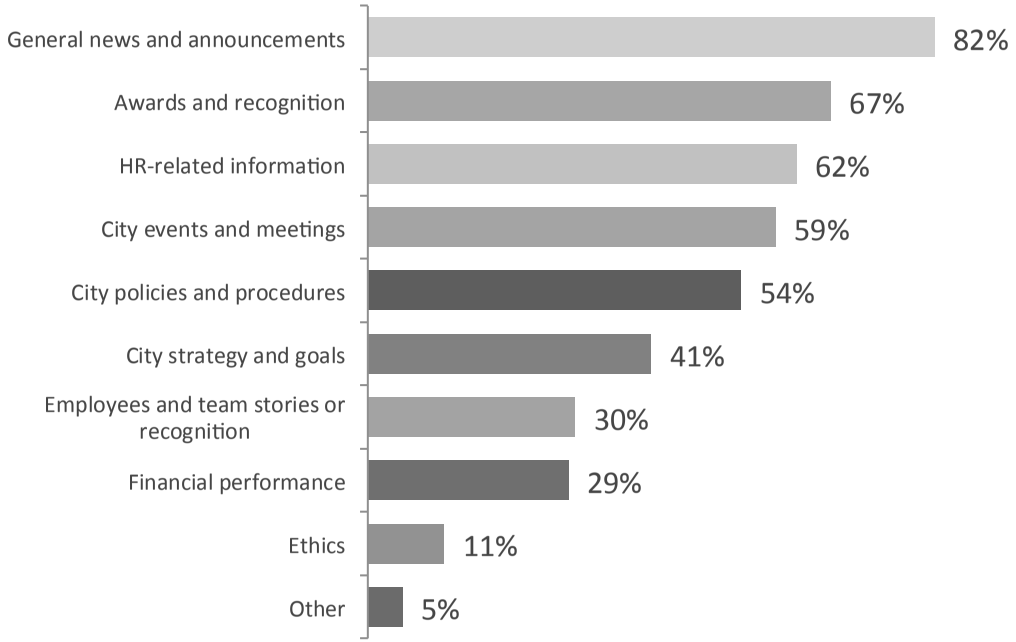
Q: Through which of the following information sources/communications channels do you receive news and information about the City of Raleigh? (n=426)


Emails (general) 88%
Co-workers/peers 73%
Corecon 65%
Communications from direct supervisor 63%
City of Raleigh Website 60%
Updates from City Manager 53%
Communications from head of my dept. 44%
Department-wide meetings 35%
Printed materials 32%
Department newsletters, My Raleigh, etc. 31%
Social channels - from the City 12%
Social channels - specific to dept. 10%
RTN 9%
Public hearings 9%
Other 6%

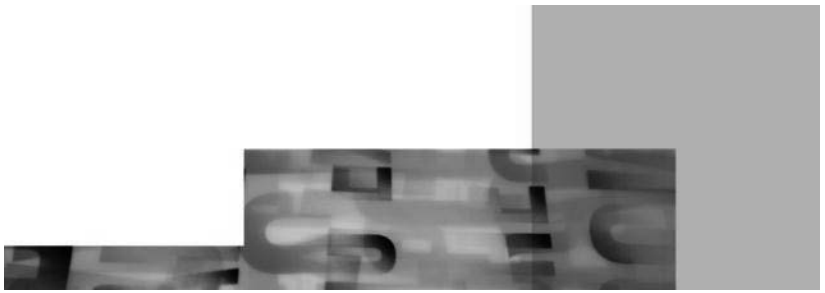
Employees: **What Types of City information are You Receiving?**

An overwhelming majority of employees are receiving general news and announcements. Two-thirds of employees receive information regarding awards and recognition about their peers.

Q: Now, think about the types of information that you receive. Please indicate which of the following types of information you're receiving through City communications. Select all that apply. (n=426)



- **Office employees are significantly more likely than those in the field or who spend their time in both places to receive human resources-related information.** Not surprisingly, employees in the field are more likely than office employees to receive information regarding city policies and procedures.
- Newer-tenured employees are more likely to get information about awards and recognition, human resources data, city events/meetings and city strategy/goals.



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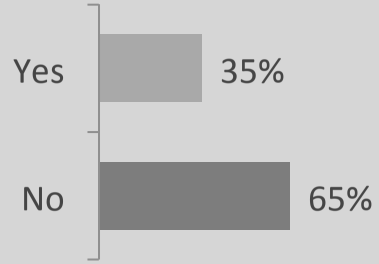
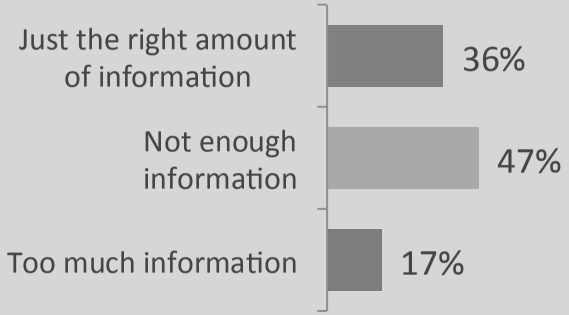
Employees: **What Types of Information Do You *Want* to Receive?**

A majority of employees don't want new information from what they are currently receiving but of the information they do receive, almost half say they are not receiving enough.

Q: Is there any type of information that you'd like to receive that you're not currently receiving? (n=426)



Q: In your opinion, do you receive…? (n=426)



See Appendix for Additional Insight into Internal Communication Tools (slides 64-67)

Additional Types of Information that Employees Are Seeking

- **Employee Information** – e.g., recognition, success stories, management information, info from supervisors
- **Professional Development** – e.g., opportunities for professional development, training opportunities
- **Human Resources** – e.g., general HR news, compensation, benefits information, job postings, hirings and firings
- **City Management** – e.g., city policies and guidelines (including changes to them), budget/finance information, department information
- **Events and construction** – e.g., entertainment events, construction plans, new projects, road closures
- **Other** – e.g., goals, future city plans, strategic information, timely updates

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Appendix

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The power of true

Detailed Digital Findings

- ✓ Defining Raleigh's Social Opportunities
- ✓ Social Conversation Analysis
- ✓ Landscape Analysis – Boston and Austin
- ✓ Search Visibility

Raleigh

- ✓ *Raleigh Social Identity*
- ✓ *Social Conversation Analysis*
- ✓ *Search Visibility*

Raleigh at a Glance

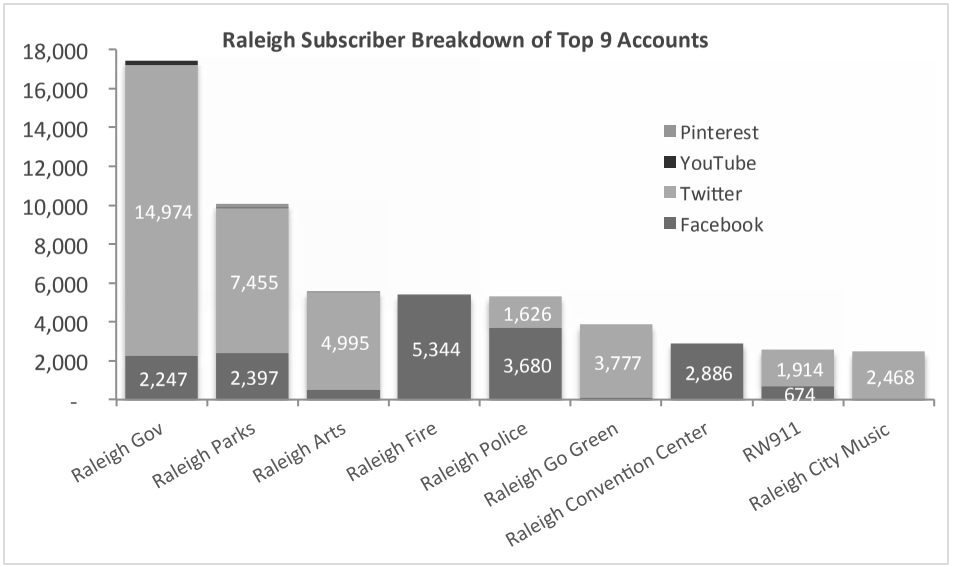
The City of Raleigh and its affiliates operate over **54 owned accounts across 5 social platforms** and have amassed **over 923,000+ subscribers** to those properties.

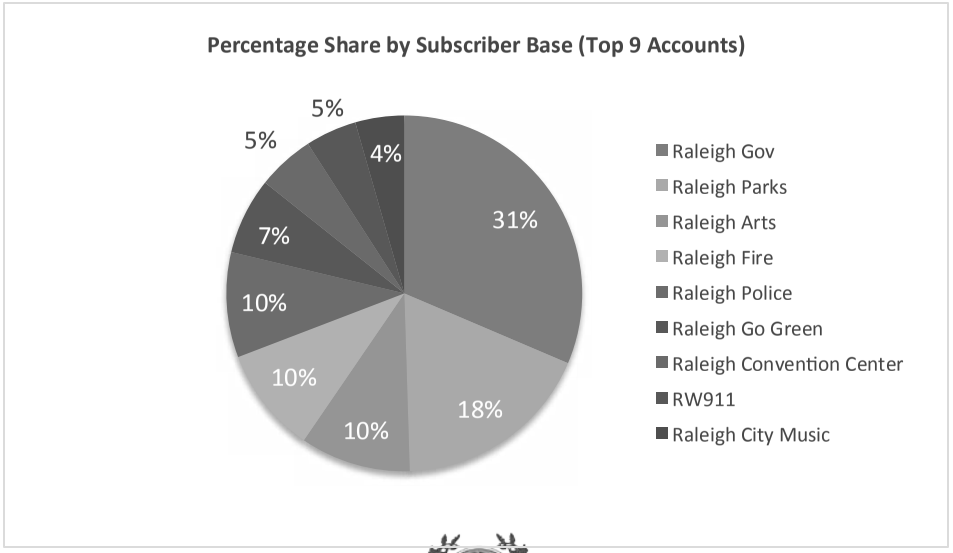
Surprisingly, 54% of the City's total social community of followers and subscribers are following only the top 7% of its online accounts.

The City's largest social presence is its City of Raleigh Government general profile -- the majority of which follow the City's @RaleighGov Twitter profile. Raleigh Parks has accumulated the second largest following, primarily on Twitter as well, due to its semi-frequent publishing schedule and human interest content.

Though Raleigh has a similar amount of social accounts as compared to cities of its size and larger, many accounts are inactive or publish infrequently.

The City is also lacking a centralized social media hub where citizens can discover the channels it operates. This information is instead accounted for in the 'Site Information' section of Raleigh.gov, which may be confusing and difficult to locate for site visitors.





Owned Social Accounts

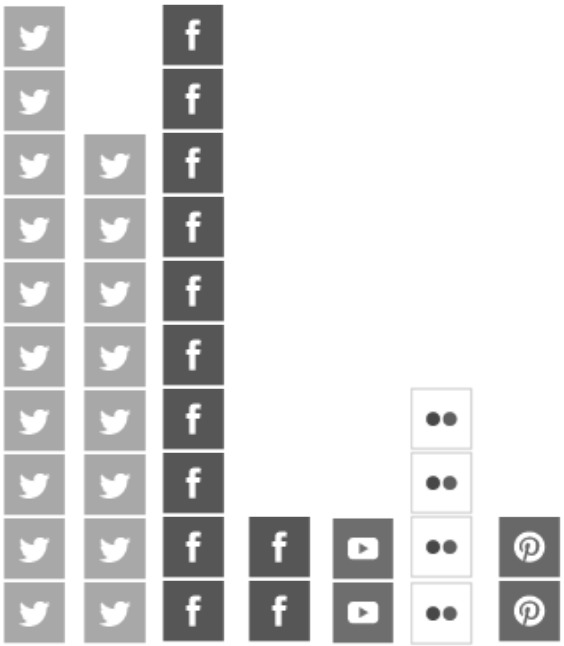
*The City of Raleigh owns, operates or influences a total of **54** social properties. . .*

Of the City of Raleigh's owned social entities, its departments and intiatives make up 18 Twitter accounts, 12 Facebook pages, two YouTube pages, four Flickr accounts and two Pinterest profiles, communicating the voice of the City directly through social channels.

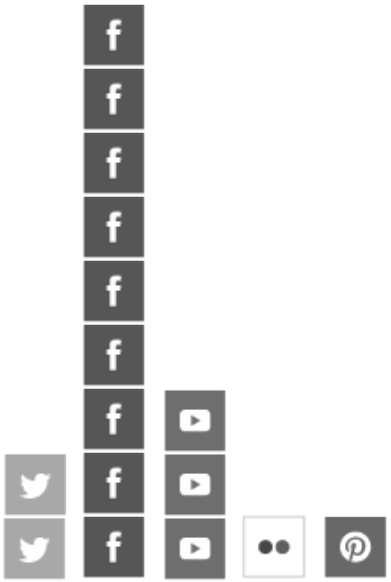
However, **16** accounts are led by partners and affiliates, and ownership is not always clear.

KEY

- YouTube
- Facebook
- Pinterest
- Twitter
- Flickr



Raleigh Owned Social Accounts



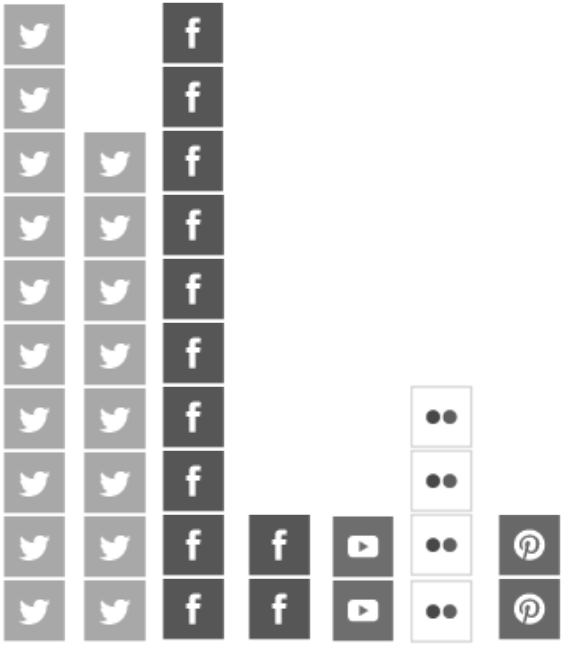
Affiliates (Unclear Ownership)

‘Raleigh’ Social Accounts

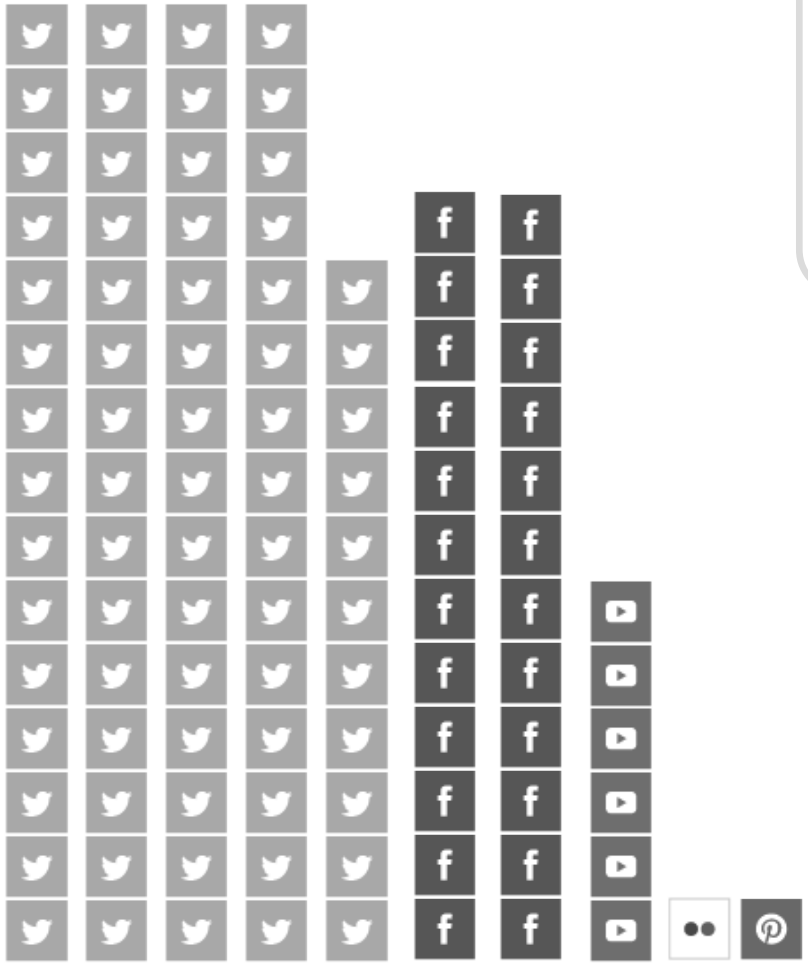
*. . . But **87** others use Raleigh branding and help to shape the identity of the city in the eyes of its key audiences*

It’s extremely important that the City establishes strong relationships with partners who have a hand in shaping the identity of Raleigh online.

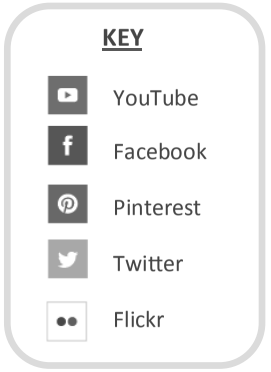
Social engagements should focus on developing synergies and deepening strategic alliances.



Raleigh Owned Social Accounts



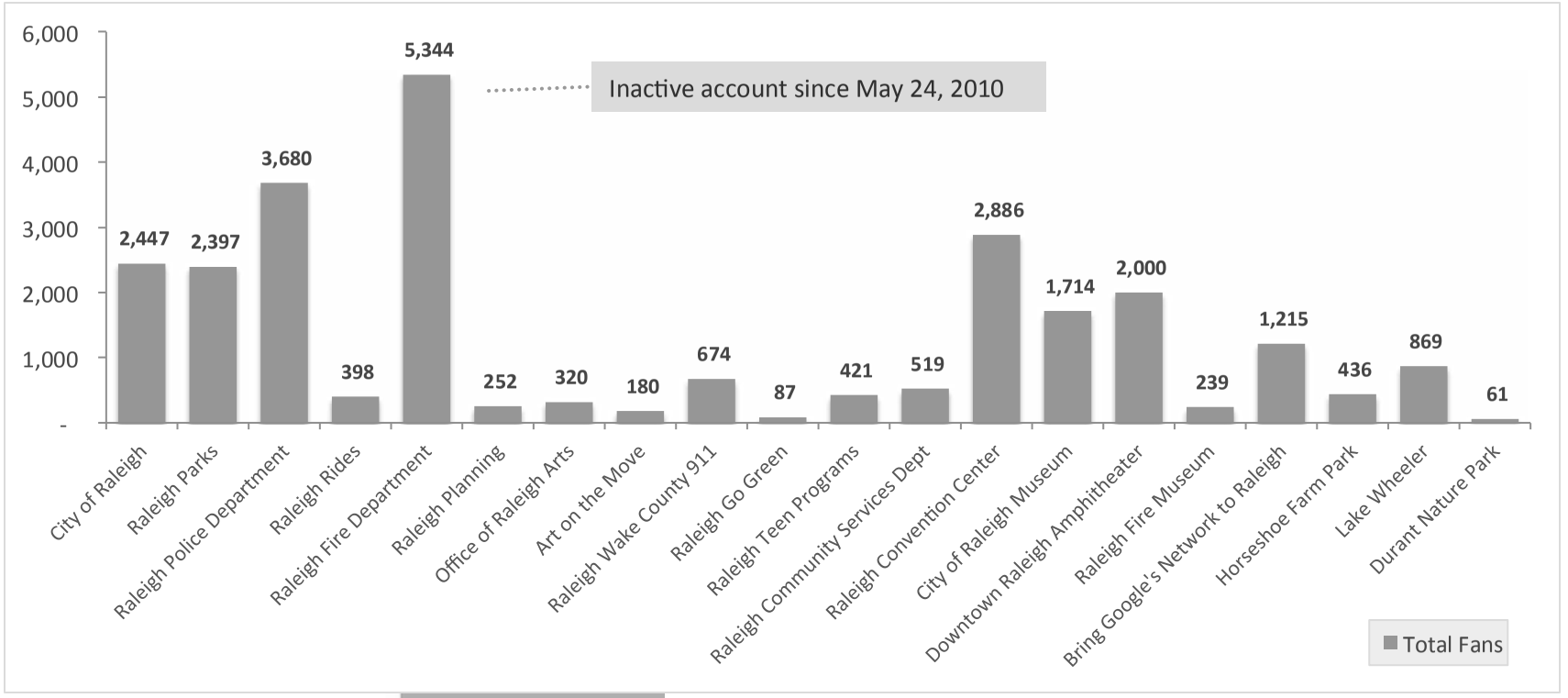
City Affiliates (Unclear Ownership) + ‘Raleigh’ Social Accounts



Facebook Community

Raleigh Fire Department, the City's most 'liked' Facebook page has been inactive for four years

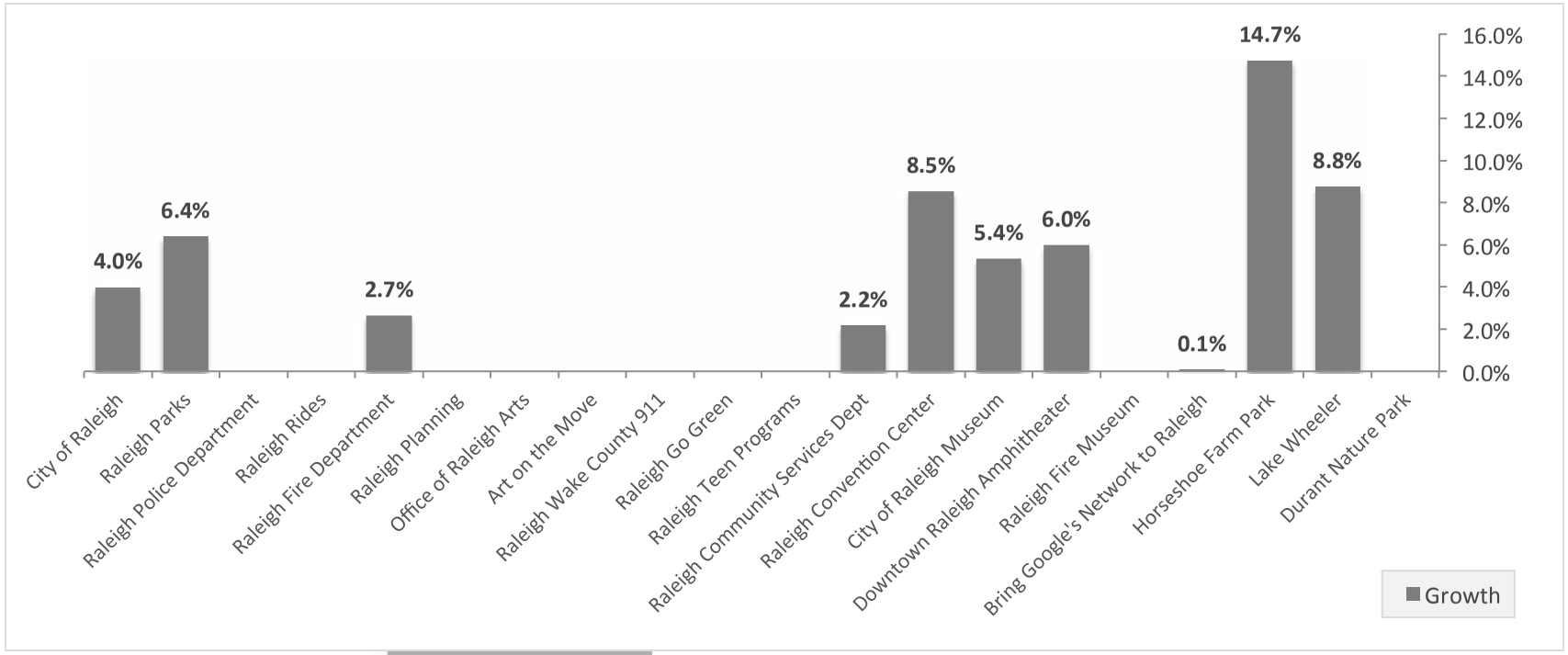
- The official City of Raleigh Facebook page has the fourth largest community, but does little to engage it or respond to comments.
- Raleigh's largest social community, the Raleigh Fire Department, which makes up approximately 20% of the City's total Facebook following, has been inactive since May 24, 2010.
- 55% of the City's entire Facebook community is made up of four accounts – City of Raleigh, Raleigh Fire Department, Raleigh Police Department, and Raleigh Convention Center.
- Improvements to these core accounts can therefore go a long way to better position the City in social, engage with its citizens and communicate its vision in a participatory manner.



Facebook Page Growth Rates

Some communities are growing faster than others, such as 'Horseshoe Farm Park' and 'Lake Wheeler'

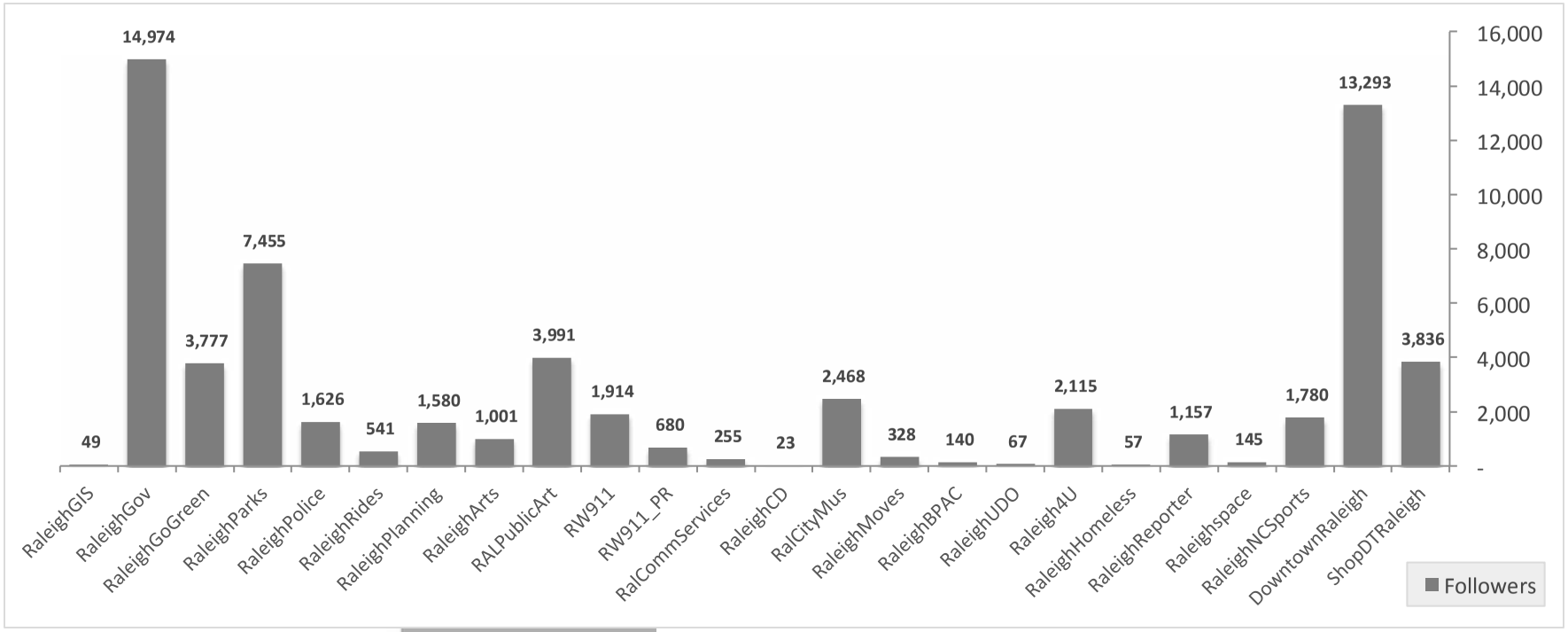
- While the official 'City of Raleigh' Facebook page is growing fairly steadily – at 4% over the past three months – its current model of one-way communication may lead to disinterested fans.
- Though the 'Raleigh Parks' Facebook community is not the largest of all owned accounts, its high growth rate suggests people are deliberately coming to the page in order to find the information they need.
- It is unclear whether or not the fastest growing Facebook profiles, like 'Horseshoe Farm Park' and 'Lake Wheeler' are managed by Raleigh government employees.



Twitter Community

Most Twitter users follow @RaleighGov and @DowntownRaleigh accounts

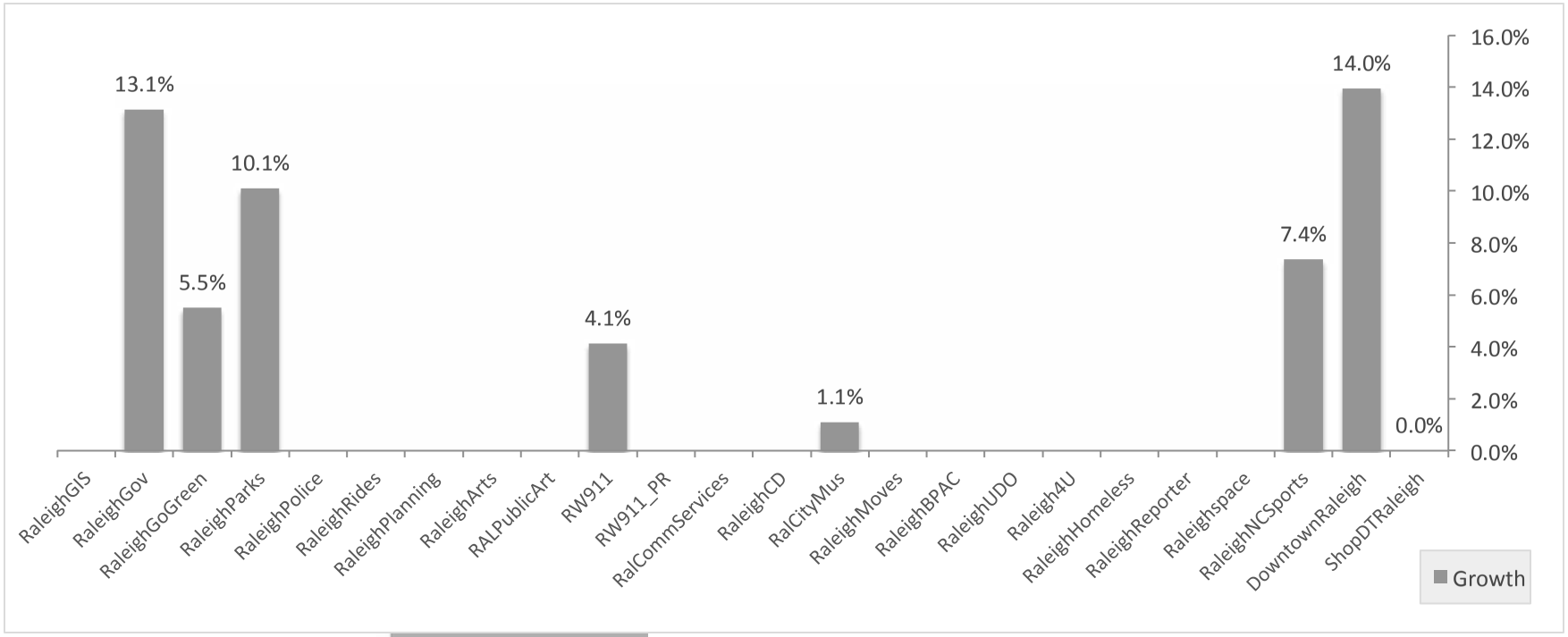
- The @RaleighGov Twitter profile has the largest of community of followers of all owned accounts, giving way to a prime opportunity to begin building an online network of city advocates through strategic engagement.
- Some accounts, like @RW911_PR and @RaleighGIS, have small enough followings and enough cross-over in terms of type of content provided, that it may make sense for them to be merged with other accounts for more streamlined communication.
- For accounts with the smallest communities and sparse, irregular posting - like @RaleighCD and @RaleighBPAC - it is unlikely they will see growth and would be better off eliminated entirely.



Twitter Account Growth Rates

Few of the Twitter communities are seeing growth – capitalize on the ones that are

- Only a small handful of Raleigh owned channels are seeing growth, but those that are growing are doing so quickly through regular engagement.
- With @RaleighGov having the both the largest community and the fastest growth rate, investment into this channel in an effort to optimize and further capitalize on this growth makes sense, but must also align with the City's overarching goals.
- Working closely with affiliated accounts like @DowntownRaleigh that have high growth rates provides an opportunity for cross promotion to reach a new audience and concurrently expand the City's owned account following.



Facebook Page Content

Pages with the most engaged communities are those that share a diversity of content

- Pages utilizing a wider variety of content types tend to see more engagement in the form of likes, comments and shares, such as the 'Raleigh Parks' Facebook page.
- Though it has the second smallest community, 'Raleigh Go Green' has the largest engagement rate of all owned channels at 5.88% and posts a mixture of links, photos and videos to engage its audience.
- The 'City of Raleigh' has only shared link posts, many of which appear to be auto populated, yielding an engagement rate of 1.88% -- the lowest engagement rate of any of the active Facebook pages.

Facebook	Text Only	Links	Photos	Video
City of Raleigh	0%	100%	0%	0%
Raleigh Parks	15%	76%	9%	0%
Raleigh Police Department	0%	25%	75%	0%
Raleigh Rides	6%	75%	19%	0%
Raleigh Fire Department	0%	0%	0%	0%
Raleigh Planning	0%	82%	18%	0%
Office of Raleigh Arts	5%	73%	11%	11%
Art on the Move	0%	0%	0%	0%
Raleigh Wake County 911	0%	50%	50%	0%
Raleigh Go Green	0%	67%	17%	17%
Raleigh Teen Programs	0%	0%	0%	0%
Raleigh Community Services Dept	0%	0%	0%	0%

- High **- Low**

Twitter Page Content

The City's Twitter community is slightly more engaged and accounts with diverse content perform best

- Similar to Facebook, Twitter accounts that publish a variety of content types tend to have higher levels of engagement with core audiences in the form of retweets (shares), replies and favorites.
- The City's Twitter community tends to be more responsive on average than Facebook, and the top three accounts with the highest engagement rates are @RaleighMoves (20%), @Raleigh4U (14%) and @RaleighPlanning (13%).
- @RaleighGov shares helpful news and alerts for the city, but doesn't receive more than an average of 1-2 engagements per post, suggesting that content may be misaligned with followers interest and needs, and require a more thoughtful content strategy.

Twitter	Text Only	Links	Photos	Video
RaleighGIS	0%	100%	0%	0%
RaleighGov	7%	55%	5%	33%
RaleighGoGreen	59%	32%	9%	0%
RaleighParks	24%	65%	11%	0%
RaleighPolice	0%	0%	100%	0%
RaleighRides	22%	63%	15%	0%
RaleighPlanning	15%	73%	9%	3%
RaleighArts	12%	85%	1%	2%
RALPublicArt	22%	48%	30%	0%
RW911	100%	0%	0%	0%
RW911_PR	0%	50%	50%	0%
RalCommServices	96%	4%	0%	0%
RaleighCD	0%	0%	0%	0%
RalCityMus	0%	0%	0%	0%
RaleighMoves	54%	37%	8%	0%
RaleighBPAC	0%	0%	0%	0%
RaleighUDO	0%	0%	0%	0%
Raleigh4U	31%	44%	20%	4%

- High **- Low**

Additional Insights

An active and interested online Raleigh community exists; Raleigh social channels simply need to figure out how best to engage this community

Raleigh is missing out on opportunities to deploy dynamic social media programs that would allow for the City's operations and services to expand further than ever before, engaging its citizens in timely, two-way communications.

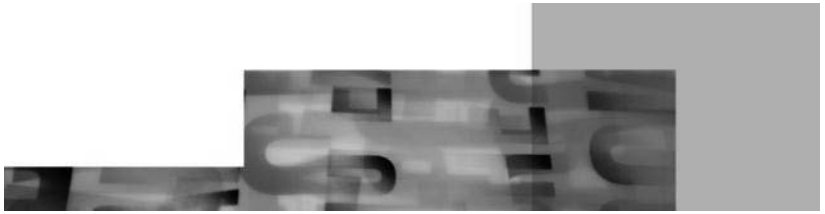
- During the primary research stage, it was observed that there is a **lack of consistent messaging in terms of what Raleigh is communicating externally**, with the exception of its accolades (i.e., placement on top 10 lists, etc.). The secondary audit of the City's social channels confirms that this assessment is accurate.
- The City's website and stories in the media are seen as important, but **social appears to represent the biggest opportunity, as this is where the largest gaps exist between importance and delivery.**
- The opportunity exists for Raleigh to evolve its current subscriber base into a **highly engaged and passionate online community of supporters**. The City's subscriber base already exists, but is not being engaged with in a strategic manner – it is now merely a matter of identifying subscribers' interests and aligning them with the bottom line goals of the City.

Much of Raleigh's content is auto-generated and lacks a voice….

City of Raleigh, NC Municipal Government shared a link.
June 20
NewsCOR
City of Raleigh Weekly Newsletter
content.govdelivery.com
The Raleigh City Council, on June 17, moved closer to putting a bond proposal on the ballot this fall for parks, recreation and cultural resources projects. Council members approved a resolution of intent...

… however there are a few posts that showcase the City's unique personality and demonstrate its potential social savvy

Raleigh Parks, Recreation and Cultural Resources Department
May 13 · Edited
We are excited to be a Playful City USA! Come play with us! #playability
KaBOOM! City of Raleigh, NC Municipal Government
Like · Comment · Share
5 1 Share



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Detailed Audience Comparison

- ✓ Downtown Raleigh Perceptions
- ✓ Audience Comparisons: Present-Day Ralei
- ✓ Audience Comparisions: Importance of Attributes in future

Downtown Raleigh Perceptions

The Downtown Raleigh Perception report from the Raleigh Convention and Visitor's Bureau provides a key look at residential perceptions of the City, reflecting residents on both the "inner" and "outer" circles of Downtown Raleigh. Feedback from this report closely mirrors feedback from other key stakeholders in terms of some of the key strengths and weaknesses of the City. Specifically:

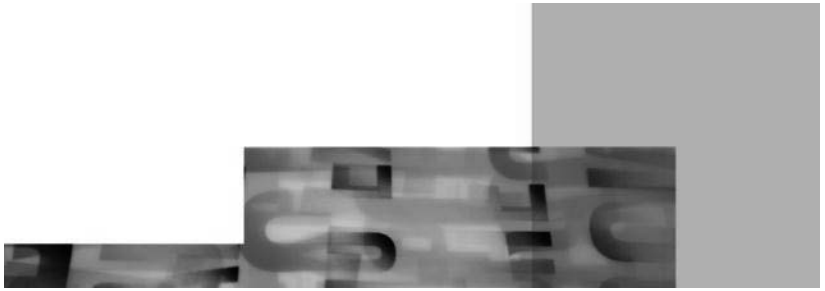
- **Public space (e.g., streetscape, green space) and moving (e.g., events and festivals, museums, etc.)** are residents' favorite things about downtown Raleigh. Downtown Raleigh has already started to capitalize on these moving activities; according to the Downtown Raleigh Alliance (DRA), downtown Raleigh hosted 243 outdoor festivals in 2013 (an increase of 128 from 2012).

- Residents suggest improvements in transit (an issue recognized by all stakeholders as being critical in the future), along with a desire for improved retail downtown, such as grocery stores. According to the State of Downtown Raleigh Report (2014) from the DRA, **downtown Raleigh is working to address this through the enhancement of multi-modal connectivity to address congestion, improve access and circulation and accommodate commuters.**

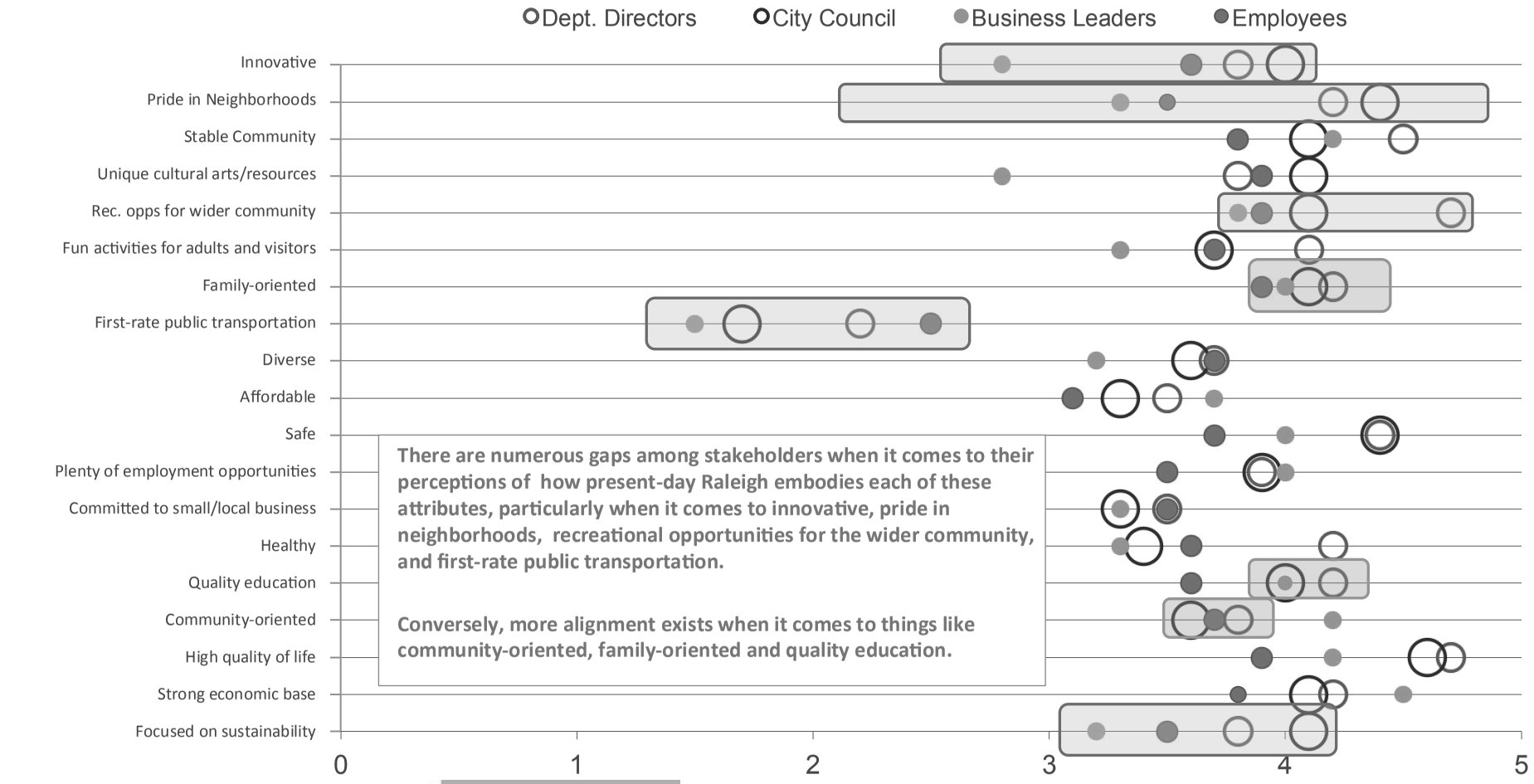
- "Moving" is the activity cited most frequently by both inner and outer residents that they enjoy in their own neighborhoods – people discuss **walking, in particular, which is often paired with socializing, dining and green spaces**. Numerous Raleigh residents cite **Fayetteville Street as an example of a good model of a positive pedestrian environment**; they want to see more streets like this.

- "Living" also ranks high for both groups, with many comments about the **social fabric and connections that make Raleigh a friendly city**.

"***I like downtown Raleigh a lot, but it seems to be teetering on the edge of success/failure***. *I've only been here a few years, but it seems like it just needs more. Things now are pretty much on Fayetteville Street and that's it. There needs to be more development of neighboring streets to expand the area. While restaurants have been helping with this, no other businesses have been helping with this. Also, there is really no reason for me to bring my child past the Marbles museum." – Resident*



Audience Comparisons: **Present-Day Raleigh**



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Audience Comparisons: **Importance of Attributes in Future**

City Council members tend to place more importance on most attributes in the future than most other audiences.

Conversely, business leaders generally tend to place less importance on key attributes for the future.

Closest alignment exists between all four key audiences when it comes to the importance of Raleigh being positioned as having a strong economic base, high quality of life, plenty of employment opportunities and a focus on sustainability.

Even the attributes with the biggest gaps among audiences aren't terribly significant, as most audiences rate all of these attributes fairly high when it comes to their importance to Raleigh's future.

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External Tools

- ✓ Communication Tool Gaps: Importance vs. Effectiveness
- ✓ Audience Comparisons: Importance of Channe
- ✓ Audience Comparisons: Current Effectiveness Channels

Communication Tool Gaps: **Importance vs. Effectiveness**

Largest gaps seen in City's social channels.

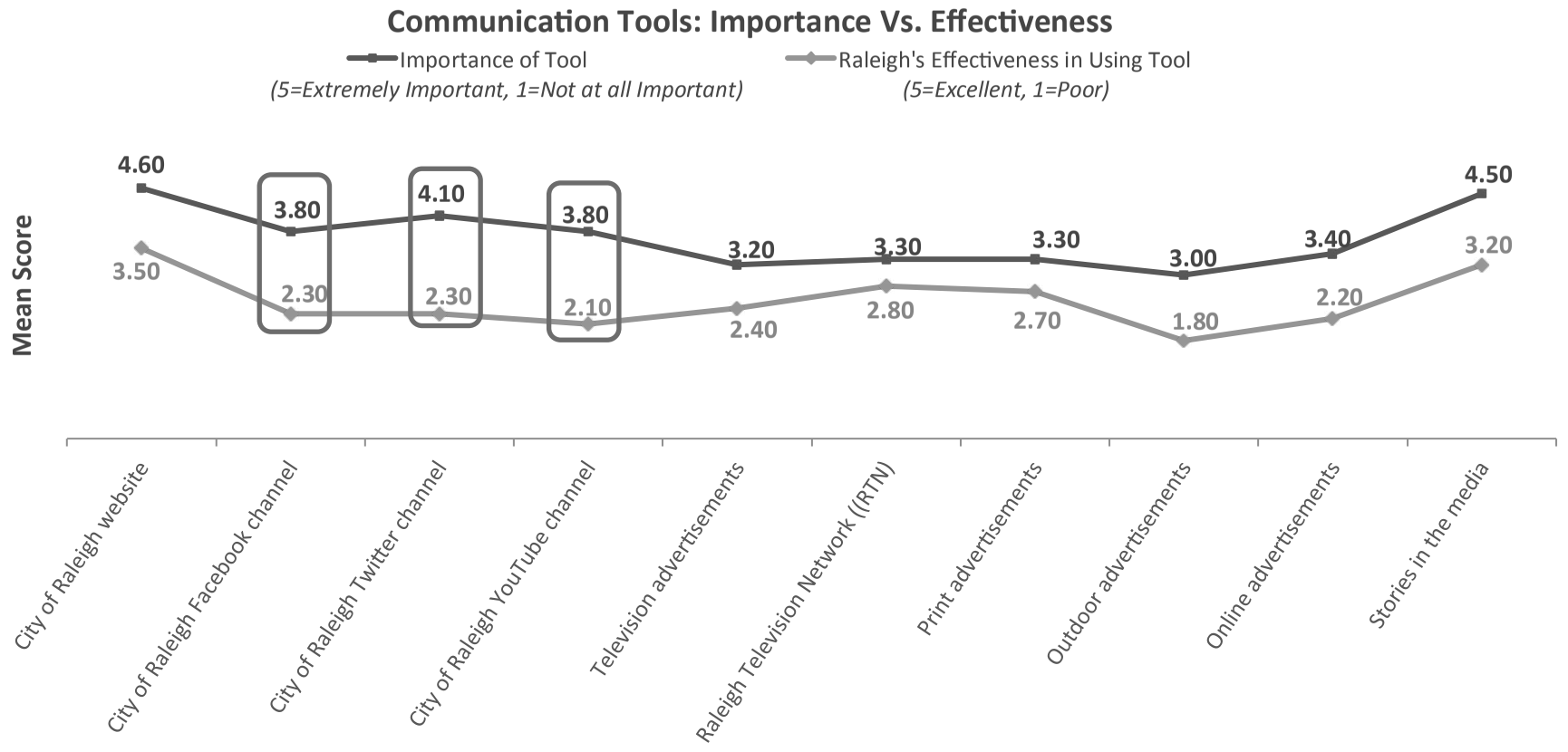
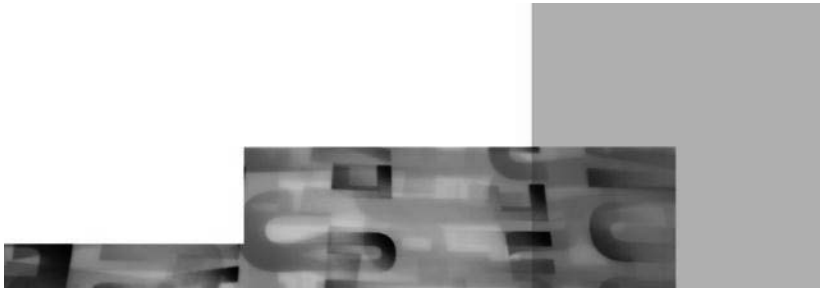


**Chart reflects responses from focus groups and in-depth interviews (n=41)*



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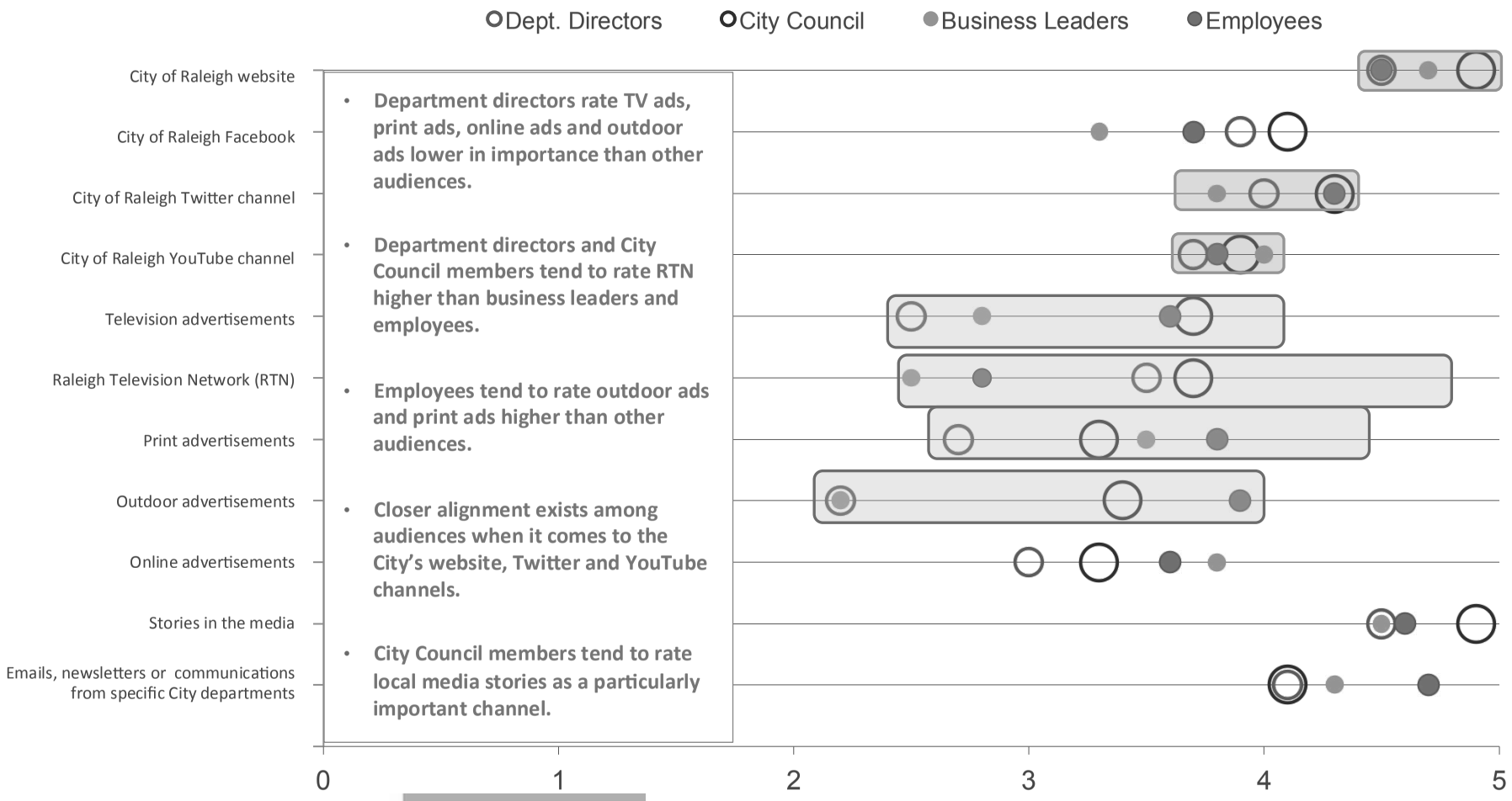
Audience Comparisons: **Importance of Channels**


Dept. Directors
City Council
Business Leaders
Employees
City of Raleigh website
City of Raleigh Facebook
City of Raleigh Twitter channel
City of Raleigh YouTube channel
Television advertisements
Raleigh Television Network (RTN)
Print advertisements
Outdoor advertisements
Online advertisements
Stories in the media
Emails, newsletters or communications from specific City departments
• Department directors rate TV ads, print ads, online ads and outdoor ads lower in importance than other audiences.
• Department directors and City Council members tend to rate RTN higher than business leaders and employees.
• Employees tend to rate outdoor ads and print ads higher than other audiences.
• Closer alignment exists among audiences when it comes to the City's website, Twitter and YouTube channels.
• City Council members tend to rate local media stories as a particularly important channel.
0
1
2
3
4
5
Mean Score Attribute Rating
(5=Excellent, 1=Poor)

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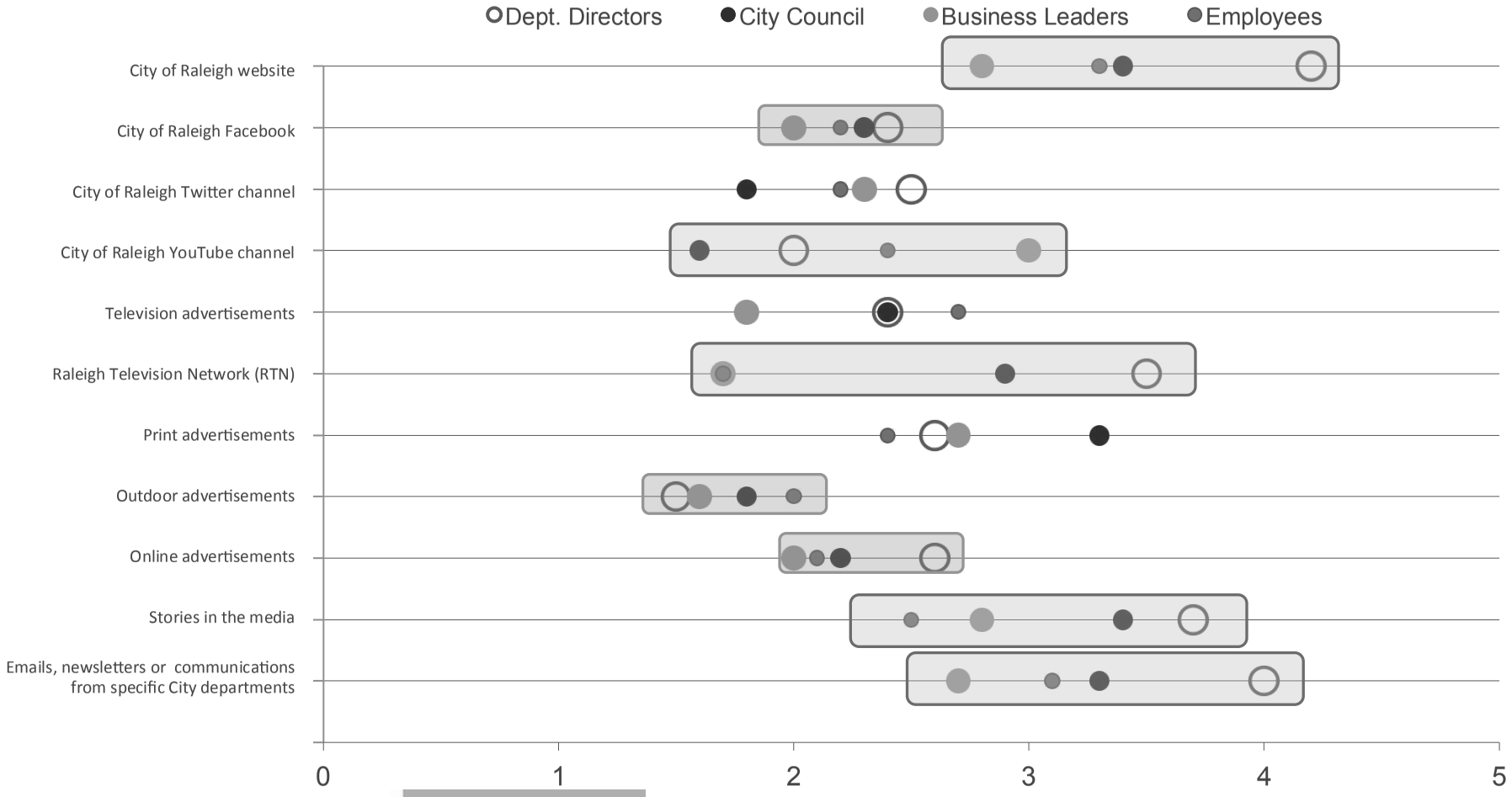
Audience Comparisons: **Current Effectiveness of Channels**



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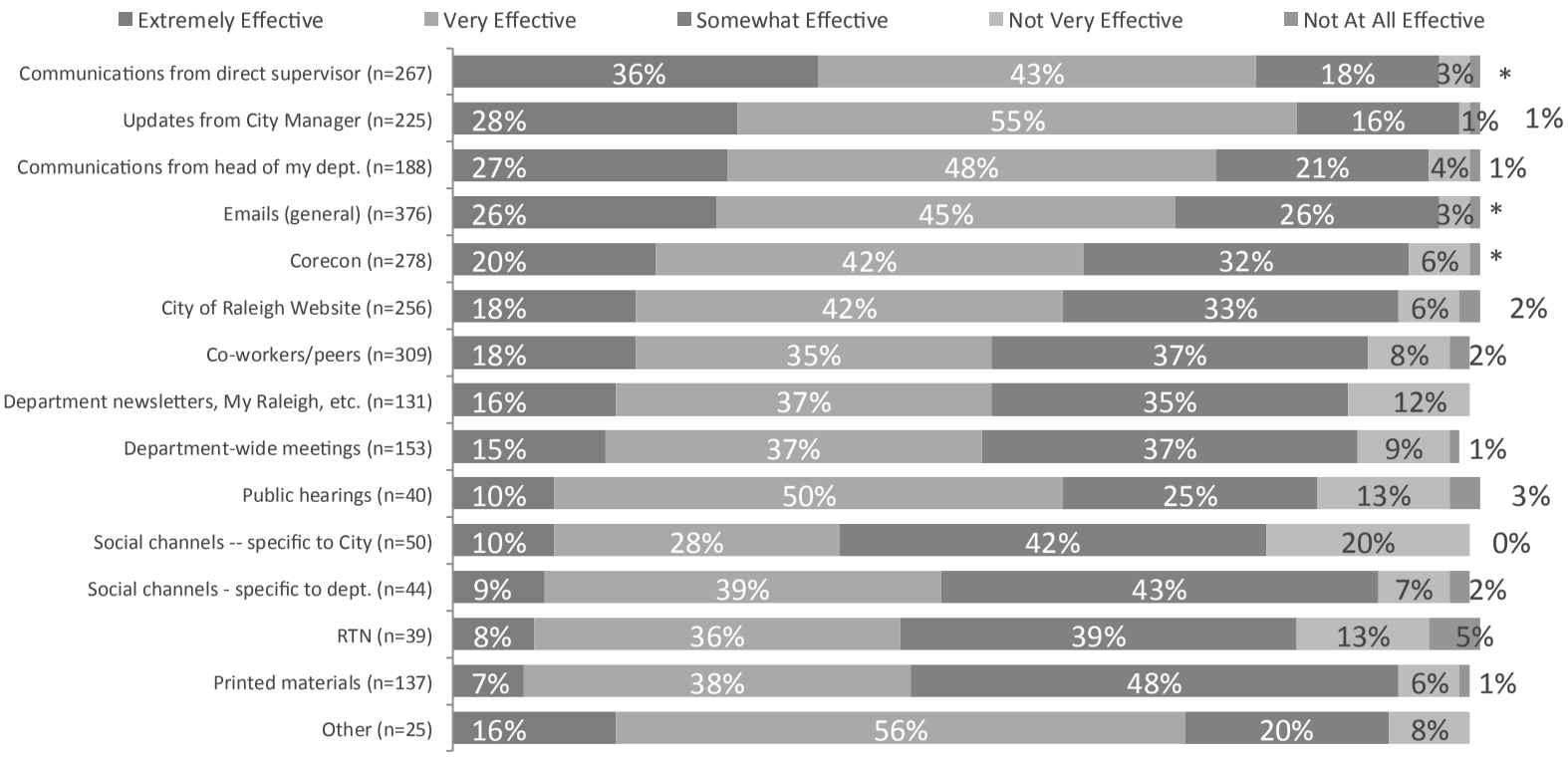
Internal Tools

- ✓ Employees: How Effective are Internal Communications Tools?
- ✓ Employees: Internal Communications Ratings
- ✓ Internal Communications Ratings

Employees: **How Effective are Internal Communications Tools?**

Communications from direct supervisors, the City Manager, department heads and emails are among the highest-rated internal tools used by the City of Raleigh.

Q: Using a five-point scale, with "5" meaning "extremely effective" and "1" meaning "not at all effective," please indicate how effective you find each of the following information sources/communication tools.[1]


Extremely Effective
Very Effective
Somewhat Effective
Not Very Effective
Not At All Effective
Communications from direct supervisor (n=267) 36% 43% 18% 3% *
Updates from City Manager (n=225) 28% 55% 16% 1% 1%
Communications from head of my dept. (n=188) 27% 48% 21% 4% 1%
Emails (general) (n=376) 26% 45% 26% 3% *
Corecon (n=278) 20% 42% 32% 6% *
City of Raleigh Website (n=256) 18% 42% 33% 6% 2%
Co-workers/peers (n=309) 18% 35% 37% 8% 2%
Department newsletters, My Raleigh, etc. (n=131) 16% 37% 35% 12%
Department-wide meetings (n=153) 15% 37% 37% 9% 1%
Public hearings (n=40) 10% 50% 25% 13% 3%
Social channels -- specific to City (n=50) 10% 28% 42% 20% 0%
Social channels - specific to dept. (n=44) 9% 39% 43% 7% 2%
RTN (n=39) 8% 36% 39% 13% 5%
Printed materials (n=137) 7% 38% 48% 6% 1%
Other (n=25) 16% 56% 20% 8%

*Less than one-half of one percent.

[1]*Based on those who indicate they receive news from these sources.*

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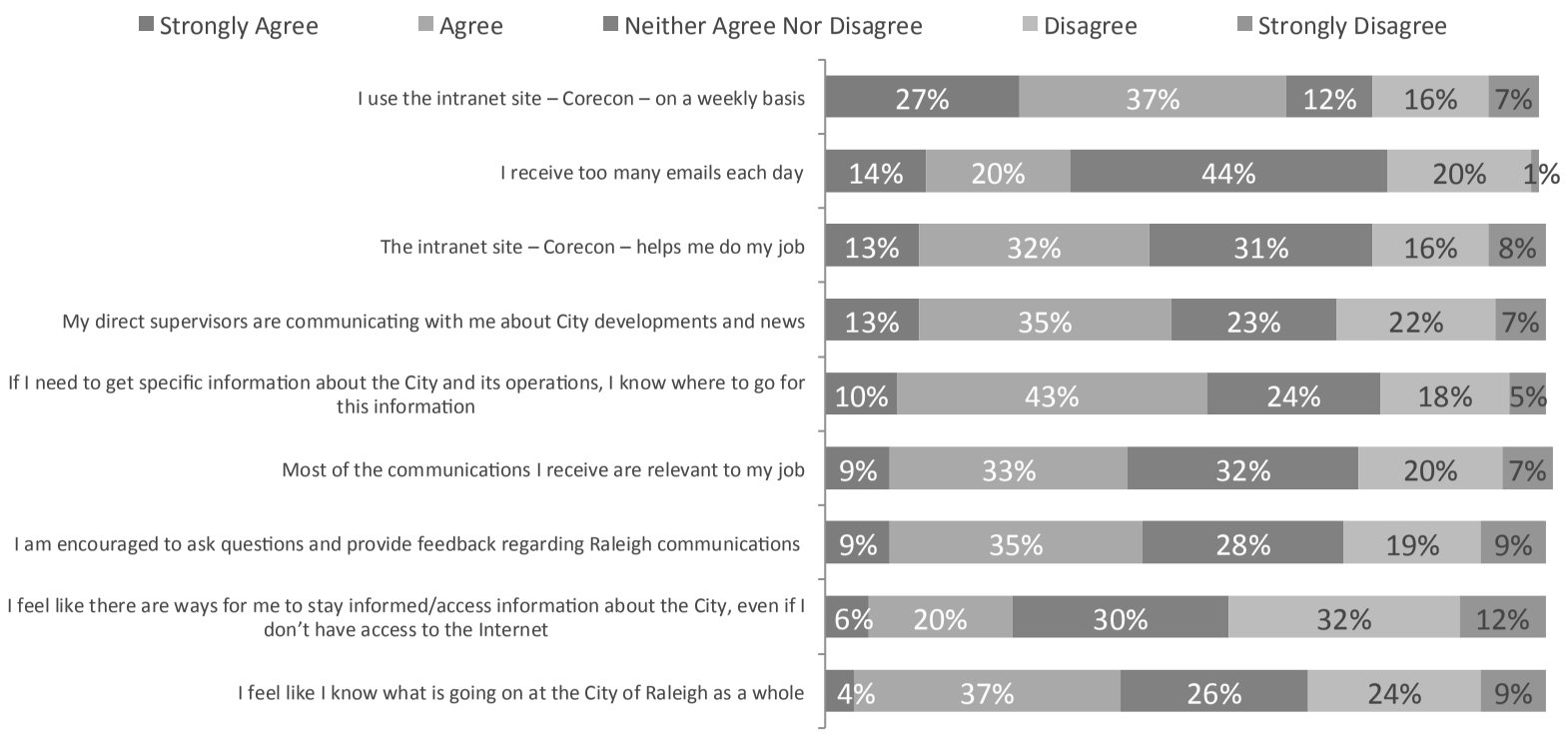
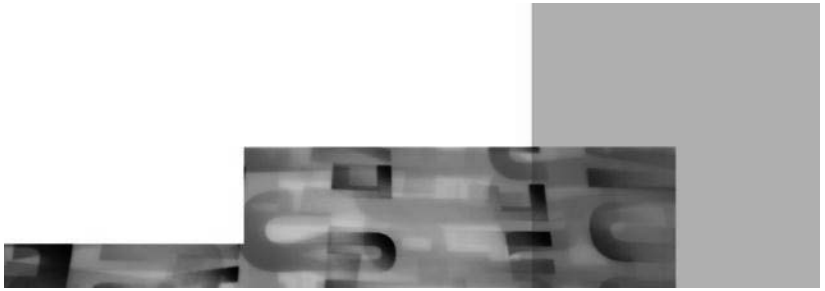
Employees: **Internal Communications Ratings**

Interesting to note that 44% of employees disagree/strongly disagree that they can access information about the City if they don't have access to the Internet.

Q: Using a five-point scale, with "5" meaning "strongly agree" and "1" meaning "strongly disagree," to what extent do you agree or disagree with the following statements? (n=426)





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Internal Communications Ratings

Lowest rated include right info, right time, right channels and adequately informing employees.

Rate Internal Communications Program for the Following Attributes

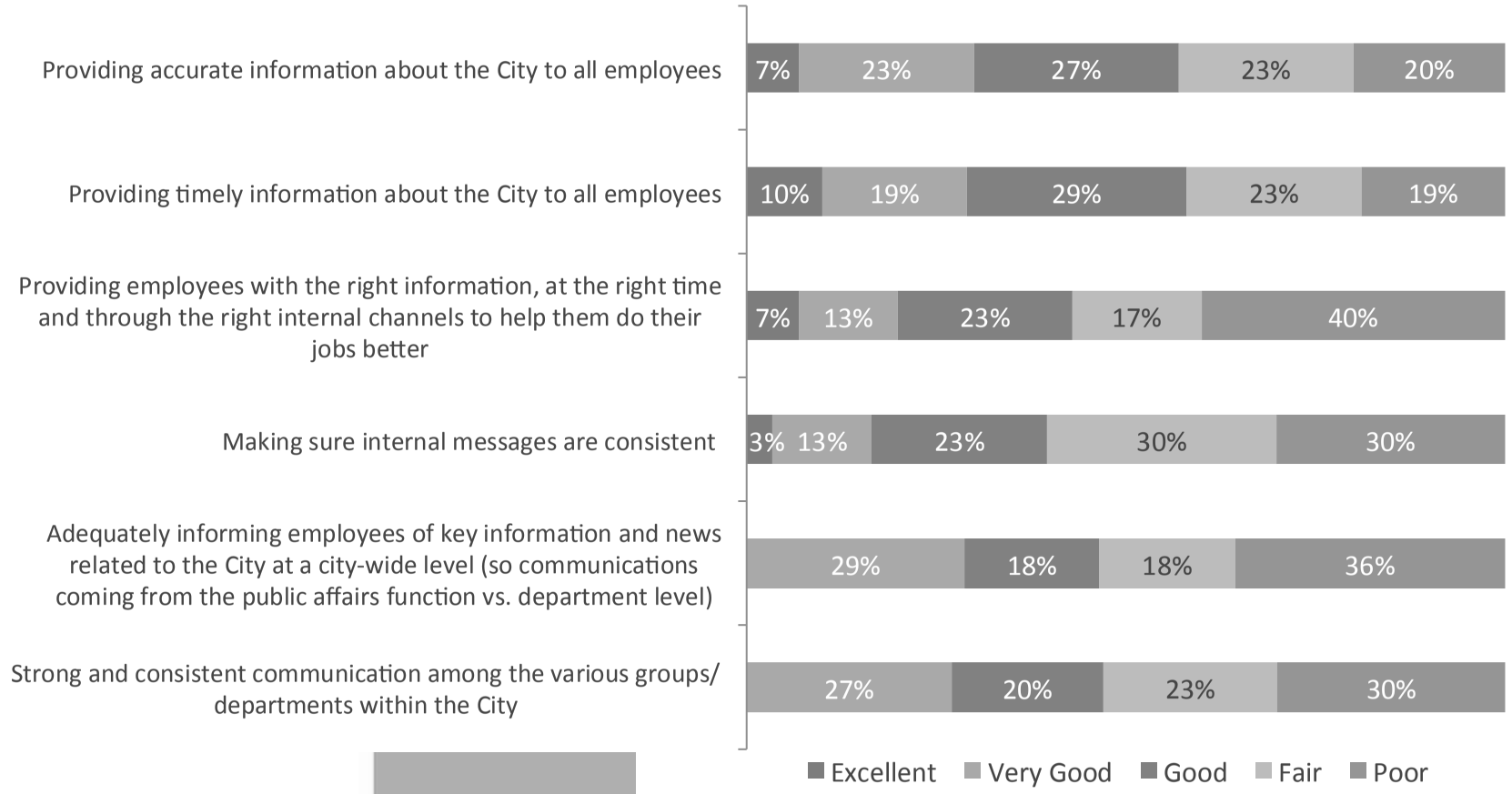
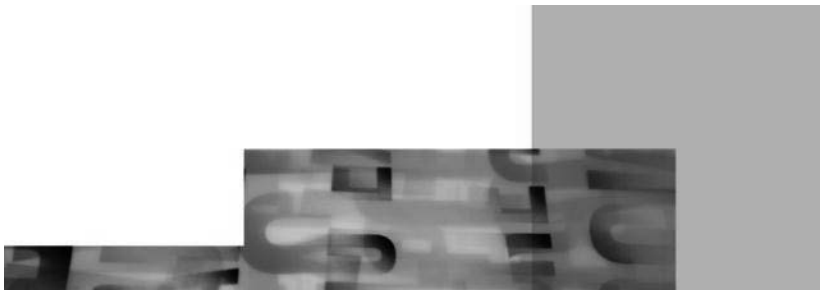


Chart reflects responses from all interviewed stakeholders (n=41).



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